GRANTS.GOV℠

FIND. APPLY. SUCCEED.℠

Grantor

User Guide

Version 7.0
August 20, 2011

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Introduction

Grants.gov has been designed to make it easier for organizations to find and apply for more than $500 billion in federal grants. With electronic access to more than 1,000 grant programs offered by all federal grant-making agencies, Grants.gov leverages the power of the Web to streamline your grant acquisition process.

This user guide has been developed to help you navigate the Grants.gov environment more easily. In it, you'll find an overview of every step of the process.

From getting started and registration to viewing and tracking completed applications, this user guide offers clarification where and when you need it.

Version Information

The grantor interface provides version information for when the system was updated. The system build version number and date the system is updated is presented on the page. This new feature will help grantors update internal communication and will facilitate interagency training and education on using the system (i.e. User Guides/New Grantor instruction.)
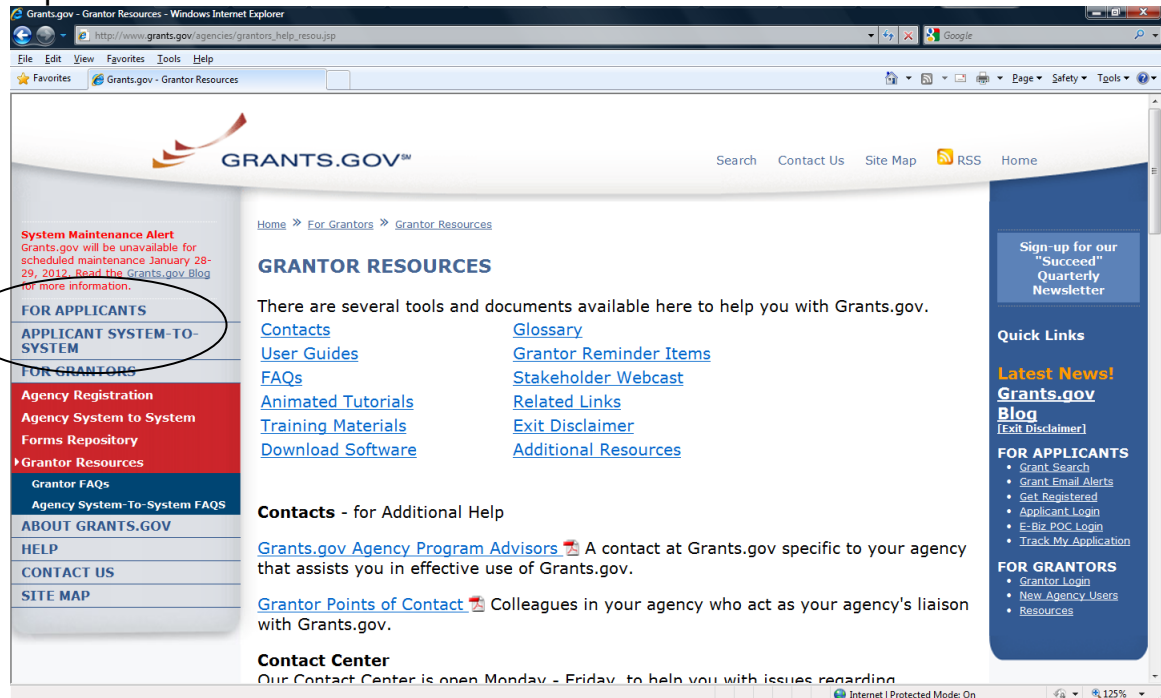
Information For Grantors

Grants.gov provides information for federal grant-making agencies in the **For Grantors** section of the website. To access specific information about Grants.gov, simply click **For Grantors** in the left side navigation on any Grants.gov page. This will take you to the **For Grantors** page.

Once on the For Grantors page, you may post grant opportunities, publish and retrieve grant applications and access resources specifically for grant-making agencies. Inform co-workers and constituents about Grants.gov, and receive help to make using Grants.gov easier.
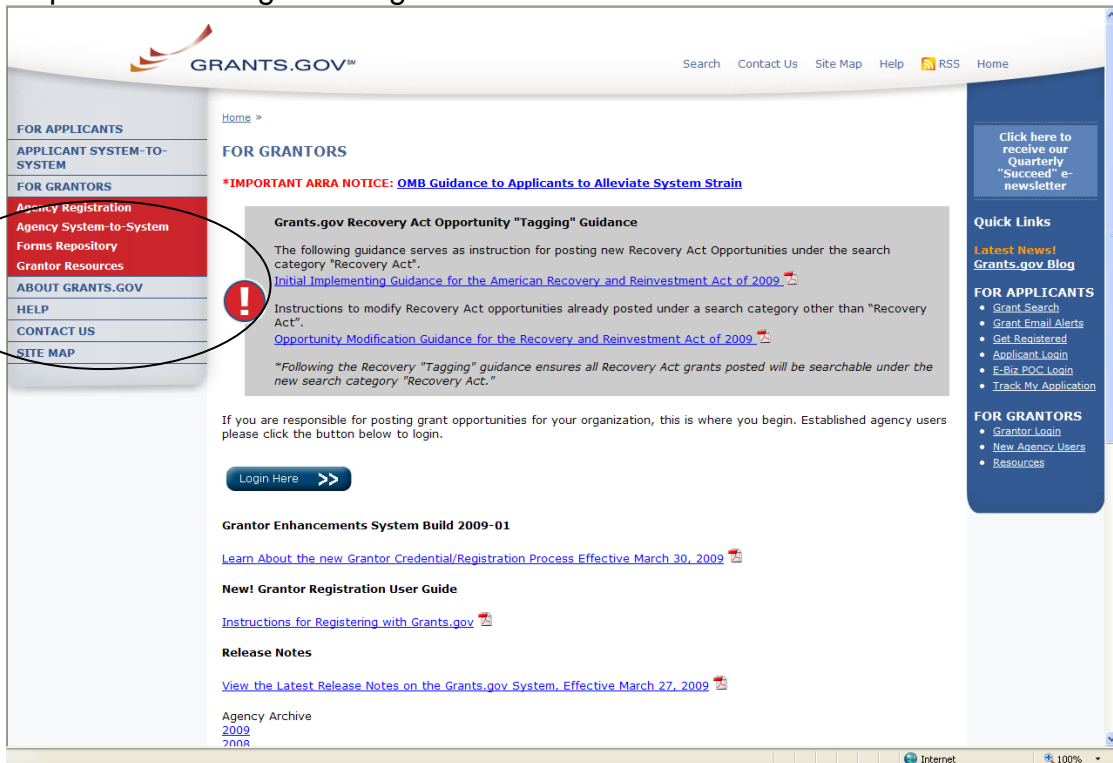
Grantor Resources

To view resources specifically for grantors, click on For Grantors in the left side navigation on any Grants.gov page. Then, select **Grantor Resources,** and the Grantor Resources page will appear. On this page you will have access to FAQs, training material, animated tutorials, key contacts and other important information.

Posting Grant Opportunities

To **post grant opportunities**, simply click on **For Grantors** in the left side navigation on any Grants.gov page. For established agency users, click the login link at the center of the page, or in the Quick Links right navigation menu.
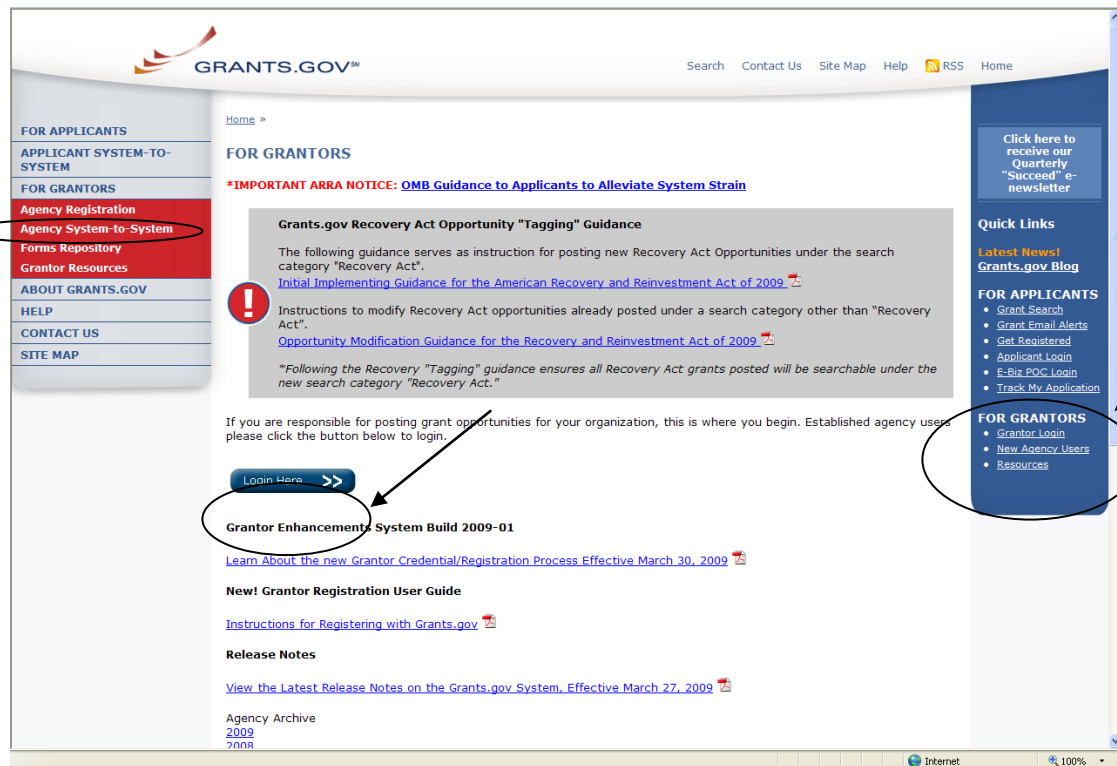
The login page will appear and you will need to log in with your username and password to continue.

Creating New Grant Opportunities

To post a synopsis and/or a grant application, you must first create a grant opportunity.

The first step you must accomplish is logging into the system. On the home page of Grants.gov, click on **Grantor Login** on the right side of the screen in the Quick Links menu. You will need to have an agency profile setup and be authorized by your main agency point of contact in order to be able to create grant opportunities.

After you have logged into Grants.gov, you will see a listing of the different roles that have been authorized to you, including Manage Opportunities.

You will be able to create a new opportunity, modify or delete an existing opportunity within the **Manage Opportunities** section. When creating a new opportunity, you will establish the groundwork information that will be used for the creation of your grant opportunity synopses and grant application packages.
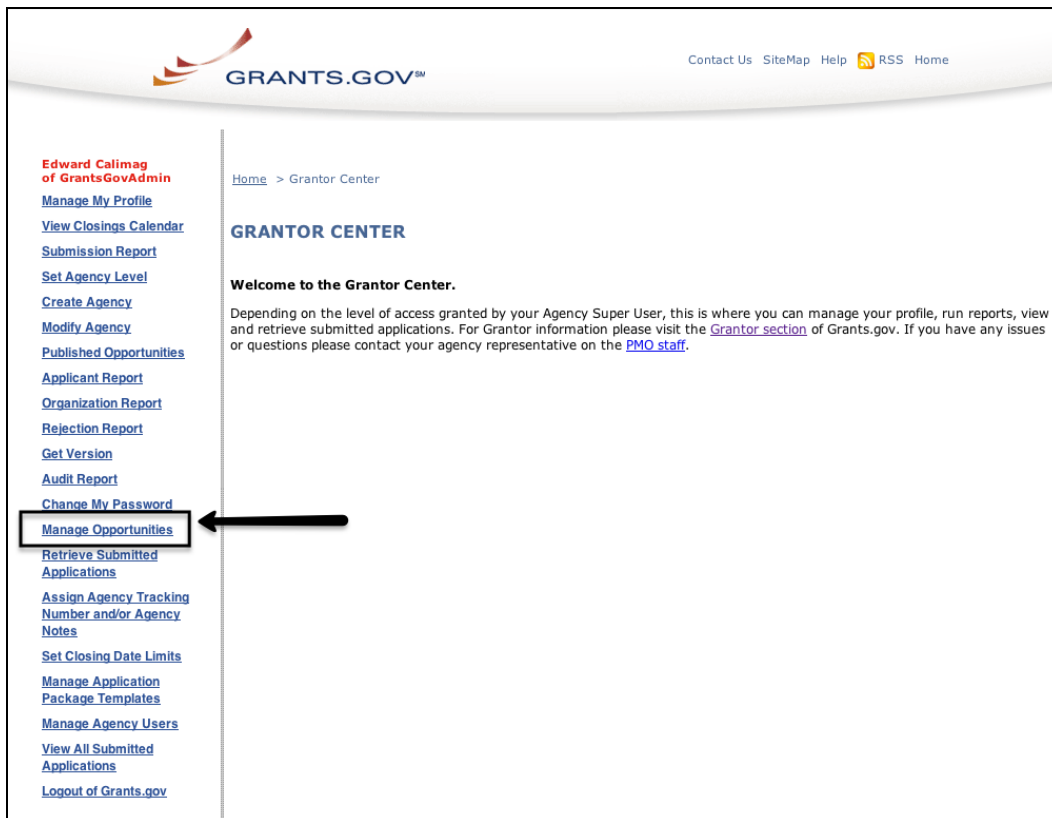
After you have logged into Grants.gov and selected **Manage Opportunities** from the left-hand side, you will be given a listing of all opportunities currently posted for your agency.

To create a new opportunity, select the **Create Opportunity** button.
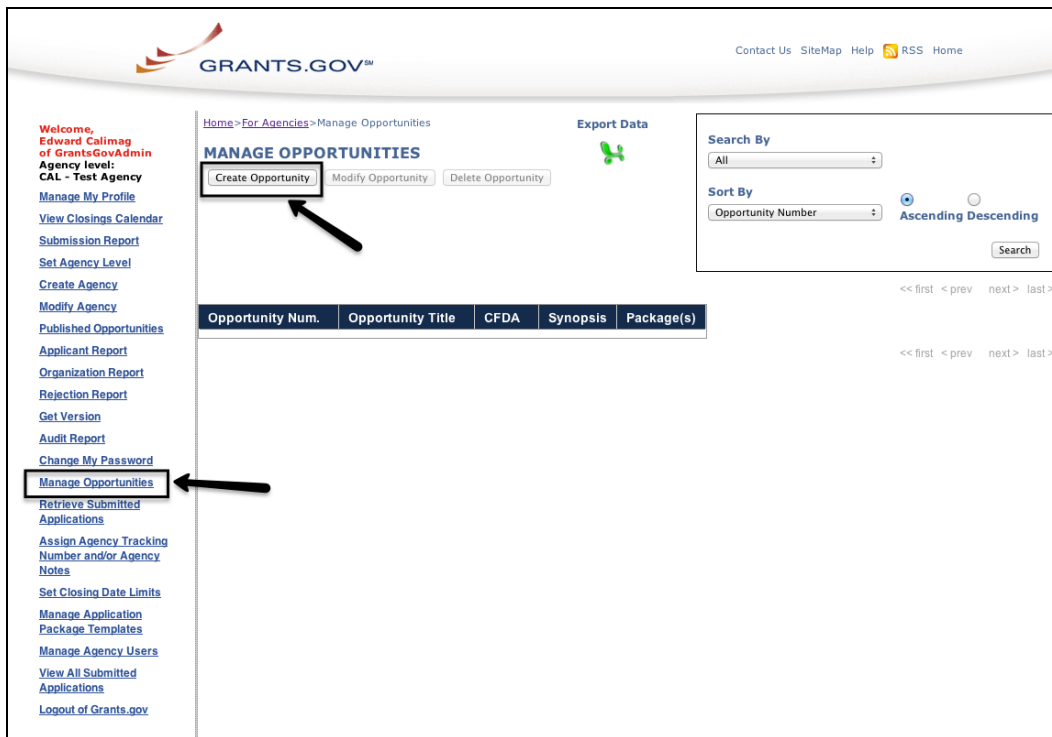
The Grant Opportunity Properties screen will provide the basic properties that you will need to enter for the new Grant Opportunity. These elements include the following: (* Mandatory fields)

Opportunity Number*: The Opportunity Number is a number that you choose to identify your grant opportunity within the Grants.gov system. You must enter a number into this section – the system will not automatically generate a number for you.

Opportunity Title*: This is the title of your grant opportunity. Your Opportunity Title should accurately reflect the nature of your funding opportunity.

Opportunity Category*: You need to select a category for this particular opportunity. The choices are Discretionary, Continuation, Mandatory, Earmark or Other. If the opportunity falls in between one or more of these choices,

please select the option that is closest to the description of the opportunity. Choose **Other** if the opportunity is not related to either of the category options and provide a category explanation.

** Opportunity Category is not used during the query for American Reinvestment and Recovery Act (ARRA) opportunities. Select **Other** as the opportunity Category and enter ARRA, American Reinvestment and Recovery Act or RA within the Category Explanation field in order for applicants to search for the opportunity under Recovery Act on the site. Recovery Act and related tags should also be included within the Opportunity Title. View specific Recovery Act guidance:*
[*http://www.grants.gov/assets/AgenciesPostedRA.pdf*](http://www.grants.gov/assets/AgenciesPostedRA.pdf) *.*

Category Explanation (*if opportunity category is other): In this field please indicate the category and a brief explanation. This field is required if **Other** is selected as the Opportunity Category.

CFDA Number: You can enter numerous CFDA numbers if your opportunity falls under different CFDA programs. Multiple CFDA numbers can be added using a comma or space in between each entry.This is an optional field. If it is a new program number, you will need to wait for your program to be published to CFDA.gov before you will be able use the CFDA number.

After you have entered this information, you must add either a synopsis or application package in order to have the grant opportunity properties saved.

*For Mandatory Grants do not post a synopsis, instead only post the application package. Then email the applicant the Opportunity Number of the grant so they can apply.

Modifying Grant Opportunities

After creating a grant opportunity, it will be listed as one of the available opportunities that you can modify within your agency's Manage Opportunities listing; this includes adding a synopsis or application package as well as deleting them.

To view the listing of the opportunities, use the search box on the right. In the search box use the dropdowns to select the criteria and then select the **Search** button to view the results.

To modify a grant opportunity, select the opportunity you wish to modify by clicking on the opportunity and then the Modify Opportunity button will become active.

The next screen will allow you to modify the properties of the Grant Opportunity, the Synopsis, the Application Package(s) and Full Announcement Attachments. Just click on the **Modify** button that is under the section you wish to modify.

Also, you will be able to add a synopsis, application package(s) and Full Announcement attachments if you had not added these previously. The screen below shows you an example where a Synopsis or an Application Package can be added. To add a Synopsis or Application Package simply click the **Add** button next to the section you would like to add to.

You can also delete the synopsis, application package(s) and Full Announcement Attachments within this opportunity. To add or delete attachments for a synopsis, click on the **Attachments** button. You can only add or delete.

Please note that if you MODIFY or DELETE any of the existing information for this opportunity, it could impact an applicant's ability to submit an application that was previously downloaded before the modification.

An email can be sent to those applicants regarding package modifications. If you choose to send an email please make sure to select the option under **Select to send email** then click **Publish**. No email notification will be sent for this package change if the checkbox "Select to send Email:" option is not selected.

Remember you are about to make changes to your application package, this could potentially invalidate any applications that have already been downloaded.

Once you click Publish you will be directed to the Package Publication Verification screen. To customize the email sent to those applicants who signed up for updates for the grant opportunity, type your message in the

comments field. Once you have completed your message in the comments field, click the Publish button.

The email will be sent automatically to the applicants who have signed up for the updates.

Deleting Grant Opportunities

After creating a grant opportunity, it will be listed as one of the available opportunities that you may delete within your agency's Manage Opportunities listing.

To view the listing of the opportunities, use the search box on the right. In the search box use the dropdowns to select the criteria and then select the **Search** button to view the results.

To delete the grant opportunity (e.g. the synopsis, application packages and all attachments), select the opportunity you wish to delete by clicking on the opportunity listed and then select the **Delete Opportunity** button.

You will receive a confirmation screen when you request to delete an opportunity. This will delete the ENTIRE opportunity and everything that is attached will be deleted. If you just need to delete a portion of an opportunity, refer to the **Modifying Grant Opportunities** section.

GRANTS.GOV℠

Contact Us   SiteMap   Help   RSS   Home

Welcome,
Edward Calimag
of GrantsGovAdmin
Agency level:
CAL - Test Agency

Manage My Profile

View Closings Calendar

Submission Report

Set Agency Level

Create Agency

Modify Agency

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Applicant Report

Organization Report

Rejection Report

Get Version

Audit Report

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Manage Opportunities

Retrieve Submitted
Applications

Assign Agency Tracking
Number and/or Agency
Notes

Set Closing Date Limits

Manage Application
Package Templates

Manage Agency Users

View All Submitted
Applications

Logout of Grants.gov

Home > For Agencies > Manage Opportunities > Delete Opportunity

DELETE OPPORTUNITY VERIFICATION

Please verify that you want to delete this opportunity.

Opportunity Number: CAL-COPS-ATTM-03072011
Opportunity Title: Cal COPS Attachment
Opportunity Category: Discretionary
CFDA Numbers: 00.000

[Delete] [Cancel]

If you do want to delete the entire opportunity, select the **Delete** button and the opportunity will be deleted. An applicant will no longer be able to find the opportunity on the website nor will they be able to submit an application for this opportunity.

Publishing New Synopses

In order to post a synopsis, you must first opportunity. Once you have entered the required information of a new Grant Opportunity, click on the **Add** button next to **Synopsis**.

When you are on the **Opportunity Synopsis Properties** page you will need to fill out the following forms under **Funding Properties**:

Instrument Type*: Select the particular type of funding that represents the grant opportunity. You can highlight more than one option by using either the SHIFT or CTRL key.

Activity Category*: These are the high-level categories found in the Catalog of Federal Domestic Assistance. You can highlight as many categories as you see fit. If you select **Other**, you will need to add additional information within the Category Explanation regarding your opportunity.

Category Explanation: This box becomes mandatory if you have selected **Other** in the **Activity Category** section. If you have not, then this box becomes optional and you may input additional information if needed.

Opportunity Properties

Opportunity Number: CAL-A-TEST
Opportunity Title: Test Funding Opportunity
Opportunity Category:* Discretionary
CFDA Numbers: 00.000

Funding Properties

Instrument Type: *
- Cooperative Agreement
- Grant
- Other
- Procurement Contract

Activity Category: *
- Agriculture
- Arts (see "Cultural Affairs" in CFDA)
- Business and Commerce
- Community Development
- Consumer Protection
- Disaster Prevention and Relief
- Education
- Employment, Labor and Training
- Energy
- Environment

Category Explanation:
* if Activity Category is Other

When you continue to scroll down the page you will need to fill out the following:

Posting Date*: This is the date that the opportunity will be posted to the Grants.gov website. If you set the date in the future, the opportunity will not get posted until that date. If you set it for today's date, then the opportunity will be automatically posted today after you publish the opportunity. If you set the post date for the future, any changes and modifications you perform on the synopsis will not be made public *until the posting date*. It is only AFTER the synopsis has been posted to the website that all future modifications will be made public.

Close Date: This is an optional field, but if you do not enter in a Close Date, you will need to enter information into the **Close Date Explanation** box.

Close Date Explanation: This is a mandatory field if you do not enter anything into the above **Close Date** box. Also, you can use this as an optional box if you need to include any other information pertaining to the Close Date.

Agency Contact*: This information is pre-populated by the system and is the user information for whoever is currently logged into the system. This information can be overwritten.

Email Address*: This is also pre-populated by the system and can be overwritten.

Email Description*: Enter text, which will be presented as a hyperlink to the email address provided. For example, if you entered "Help Desk", then when the synopsis is published and someone clicks on "Help Desk" it will open up an email with the email address already pre-populated in the "To" field.

Synopsis Dates

Posting Date: * [   ] (MM/DD/YYYY) 🗓

Close Date: [   ] (MM/DD/YYYY) 🗓

Close Date Explanation:
* if no Close Date is provided
[   ]

Agency Contact For Electronic Access Problems

Agency Contact: *
Edward Calimag
IT Supervisor
Phone 2026907569

E-Mail Address: *
ed.calimag@hhs.gov

E-Mail Description: *
[   ]

As you continue to scroll down the page you will need to fill out the following in the **Opportunity Eligibility Information** and the **Award Information** Section:

Eligible Applicants*: Select the eligible groups for this synopsis. Again, you can select more than one group by using the SHIFT or CTRL option.

Eligibility Explanation: If you select "Other" as your eligible group, you will need to enter text into this field. Also, if you need to include additional information on the eligibility, you can use this text field to provide that further explanation.

Cost-Sharing or Matching Requirement*: This defaults to No; please select Yes if the applicant will need to match some of the provided federal funds.

Expected Number of Awards: This is an optional field. If you know this information, please enter a numerical amount into the box. It will only accept numbers.

Estimated Total Program Funding: This is an optional field. If you know this information, please enter the total program funding. It will only accept numbers – do not enter a dollar sign, it will be automatically inserted.

Award Ceiling*: Either enter the dollar amount in numbers or write the word "none" into the field. The dollar amount will be automatically formatted, therefore, you will not need to enter a dollar sign or format the number with commas.

Award Floor*: Either enter the dollar amount in numbers or write the word "none" into the field. The dollar amount will be automatically formatted, therefore, you will not need to enter a dollar sign or format the number with commas.

Opportunity Eligibility Information

Eligible Applicants: *

City or township governments
County governments
For profit organizations other than small businesses
Independent school districts
Individuals
Native American tribal governments (Federally recognized)
Native American tribal organizations (other than Federally reco
Nonprofits having a 501(c)(3) status with the IRS, other than in
Nonprofits that do not have a 501(c)(3) status with the IRS, oth
Others (see text field entitled "Additional Information on Eligibi

Eligibility Explanation:
* if Eligible Applicants is Others

Award Information

Cost Sharing or Matching Requirement: * ◯ Yes ⦿ No

Expected Number of Awards:

Estimated Total Program Funding:

Award Ceiling: *

Award Floor: *

As you continue to scroll down the page you will need to fill out the following in the **Funding Opportunity Description** Section:

Funding Opportunity Description*: Enter a description about the funding opportunity. Do not use any special characters or HTML encoding. If you copy and paste text into this box, please review to ensure that the paragraphs have been formatted correctly and any special characters have been removed.

Funding Opportunity Description

Funding Opportunity Text Description: *

As you continue to scroll down the page you will need to fill out the following in the **Full Announcement Link** & **Archiving Policy** sections:

Announcement URL: This is an optional field. Enter the full URL where the full announcement for this opportunity is located. If you do not enter the URL, then you will need to upload the Full Announcement. Refer to the **Attaching Full Announcement/Other Documents** section for more information. You must enter the full URL, including the "http://" (example: http://www.grants.gov)

URL Description: If you enter an Announcement URL, you will need to enter text into this field. The text will appear hyperlinked on Grants.gov and the applicant can click on the text to be linked to wherever you have the Full Announcement hosted.

Archiving Policy: By default, the Archive Policy is set for 30 days from the Close Date. There are three options to select from:
- Automatic, 30 days after the close date
- Automatic, on the date that you specify
- Manual Archive – you will need to return to Grants.gov and manually archive by modifying the synopsis and selecting the option to automatically archive on a specified date – you will need to enter in the date for the archive to occur.

Publish: After you have entered in all the information necessary for your synopsis, select **Publish**. You will be given a confirmation screen that will include all of the information you have previously entered. Review this information and select **Publish** again at the bottom of the screen.

If you need to correct any information, select **Edit** to return to the previous screen to allow you to edit. If you select **Cancel**, you will return to the **Manage Grant Properties** screen and none of your work will be saved.

If you select **Publish**, you will receive a confirmation screen regarding the successful publishing of the opportunity.

If the post date you have entered is today's date, then the synopsis will appear in search results within 30 minutes.

If the post date is in the future, then you will also receive a confirmation screen regarding a successful publishing of the opportunity, but it will not appear in search results until the actual post date you entered. You will be able to edit and modify this synopsis until the post date without any of those edits being visible to the applicant.

Full Announcement Link

Announcement URL:

URL Description:

Archiving Policy

Synopsis and associated documents may be scheduled for archiving 30 days after the application's close date, or upon a user-specified date after the later than the posting date, or may be left unscheduled and manually archived later. The latest archiving date chosen for a synopsis or any associated document will become the effective archiving date for the entire document set.

Archiving Policy:

◉ Automatic, 30 days after the close date

○ Automatic, on specified date: [   ] (MM/DD/YYYY) 🗓

○ Manual archive

[Publish] [Cancel]

Modifying Synopses with a Future Post Date

This section is in reference to modifying synopses that have been published, but have a post date that is in the future. These synopses can be modified without the applicants being notified and without the record of these modifications being made public.

In order to modify a synopsis, you must select the grant opportunity from the **Manage Opportunities** section. To view the listing of the opportunities, use the search box on the right. In the search box use the dropdowns to select the criteria and then select the **Search** button to view the results.

In order to modify a synopsis, you must select the grant opportunity and then click on the **Modify Opportunity** button.

Once you enter the **Grant Opportunity Properties** screen, click on **Modify** next to **Synopsis**.

In the next screen, you will be provided the original synopsis. Make the necessary modifications and select **Publish** at the bottom of the screen.

Funding Opportunity Text Description: *

Lorem ipsum dolor sit amet, consectetur adipisicing elit, eiusmod tempor incididunt ut labore et dolore magna ali enim ad minim veniam, quis nostrud exercitation ullamc nisi ut aliquip ex ea commodo consequat. Duis aute irur reprehenderit in voluptate velit esse cillum dolore eu fug pariatur. Excepteur sint occaecat cupidatat non proident culpa qui officia deserunt mollit anim id est laborum

Full Announcement Link

Announcement URL: http://www.grants.gov

URL Description: Full Funding Announcement

Archiving Policy

Synopsis and associated documents may be scheduled for archiving 30 days aft date, or upon a user-specified date after the later than the posting date, or may manually archived later. The latest archiving date chosen for a synopsis or any a become the effective archiving date for the entire document set.

Archiving Policy:

○ Automatic, 30 days after the close date

◉ Automatic, on specified date: 09/30/2011   (MM/DD/YYYY)

○ Manual archive

[Publish] [Cancel]

You will be taken to the **Confirm Opportunity Synopsis Properties** screen.

CONFIRM OPPORTUNITY SYNOPSIS PROPERTIES

Please confirm the opportunity synopsis information before publishing.

Opportunity Properties

Opportunity Number: CAL-A-TEST

Opportunity Title: Test Funding Opportunity

Opportunity Category: Discretionary

CFDA Numbers: 00.000

Funding Properties

Instrument Type:
Grant

Activity Category:
Disaster Prevention and Relief

Category Explanation:

Synopsis Dates

Posting Date: 08/16/2011
**Close Date:** 08/31/2011

At the bottom of the screen, you will be asked to enter the details pertaining to what you have modified in the **Synopsis Modification Comments** box.

Enter what you have modified. If the post date is in the future, these comments will not be made public, but will serve as a record of what you have previously modified. After this synopsis is posted, any future modification comments will be made public so that the applicant knows what has been modified with the synopsis that was originally posted on the site.

Once you have reviewed the modifications and entered your comments, select **Publish**. If you need to make additional changes, select **Edit** and perform those revisions. If you select **Cancel** you will be taken back to the **Grant Opportunity Properties** screen.

You will receive a **Synopsis Publish Success** screen after you confirm changes and click the publish button. Please be aware that though the text states that the opportunity will be available within 30 minutes, since your post date is not until the future, the synopsis will not be published until that post date. Modifications made before the post date will not be seen by the public.
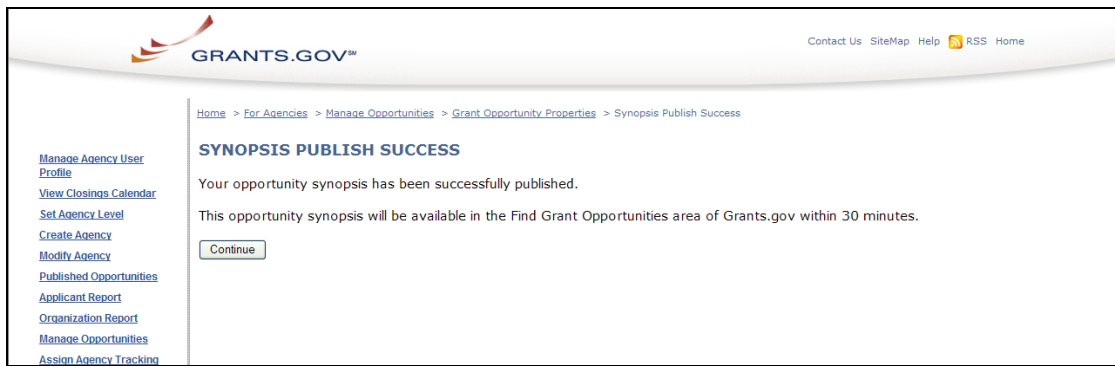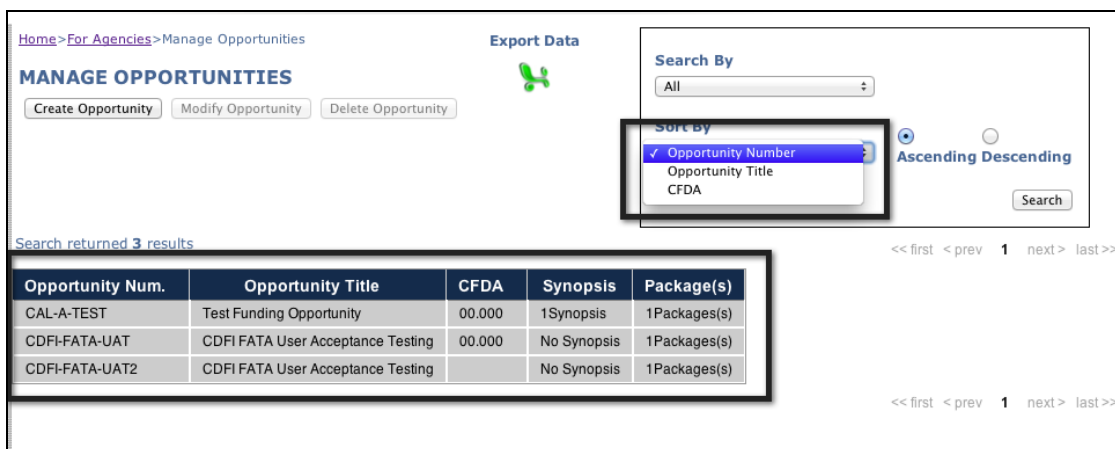
Click **Continue** and you will be directed to the Grant Opportunity Properties Screen.

Modifying Posted Synopses

This section is in reference to modifying synopses that have been published and posted to the website. These synopses can still be modified, but any modification will require the agency to document what has been modified and this documentation will be made available for the public.

In order to modify a posted synopsis, you must select the grant opportunity from the **Manage Opportunities** section. To view the listing of the opportunities, use the search box on the right. In the search box use the dropdowns to select the criteria and then select the search button to view the results.

In order to modify a posted synopsis, you must select the grant opportunity and then click on the **Modify Opportunity** button.

Once you have entered the **Grant Opportunity Properties** screen, click on the **Modify** button next to **Synopsis**.

In the next screen, you will be provided the original synopsis. Make the necessary modifications and select **Publish** at the bottom of the screen.

Funding Opportunity Text Description: *

Lorem ipsum dolor sit amet, consectetur adipisicing elit,
eiusmod tempor incididunt ut labore et dolore magna ali
enim ad minim veniam, quis nostrud exercitation ullamc
nisi ut aliquip ex ea commodo consequat. Duis aute irure
reprehenderit in voluptate velit esse cillum dolore eu fug
pariatur. Excepteur sint occaecat cupidatat non proident
culpa qui officia deserunt mollit anim id est laborum

Full Announcement Link

Announcement URL: http://www.grants.gov

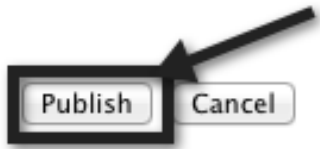**URL Description:** Full Funding Announcement

Archiving Policy

Synopsis and associated documents may be scheduled for archiving 30 days aft
date, or upon a user-specified date after the later than the posting date, or may
manually archived later. The latest archiving date chosen for a synopsis or any
become the effective archiving date for the entire document set.

Archiving Policy:

○ Automatic, 30 days after the close date

◉ Automatic, on specified date: 09/30/2011   (MM/DD/YYYY) 🗓

○ Manual archive

[Publish] [Cancel]

You will be taken to the **Confirm Opportunity Synopsis Properties** screen.

CONFIRM OPPORTUNITY SYNOPSIS PROPERTIES

Please confirm the opportunity synopsis information before publishing.

Opportunity Properties

Opportunity Number:	CAL-A-TEST
Opportunity Title:	Test Funding Opportunity
Opportunity Category:	Discretionary
CFDA Numbers:	00.000

Funding Properties

Instrument Type:
Grant

Activity Category:
Disaster Prevention and Relief

Category Explanation:

Synopsis Dates

Posting Date:	08/16/2011
Close Date:	08/31/2011

At the bottom of the screen, you will be asked to enter the details pertaining to what you have modified in the **Synopsis Modification Comments** box. Enter what you have modified. This information will be included within the synopsis and will allow the public to know what has been modified.

Synopsis Modification Comments

Synopsis Modification Comments:*

Extended closing date.

Publish   Edit   Cancel

Once you have reviewed the modifications and completed the comments box, select **Publish**. If you need to make additional changes, select **Edit** and perform those revisions. If you select **Cancel** you will be taken back to the Grant Opportunity Properties screen.

You will receive a Synopsis Publish Success screen after you confirm changes and click the publish button. Please be aware that it could take up to 30 minutes for the modified synopsis to be made public.

GRANTS.GOV℠

**Welcome,
Edward Calimag
of GrantsGovAdmin
Agency level:
CAL – Test Agency**

Manage My Profile

View Closings Calendar

Submission Report

Set Agency Level

Create Agency

Modify Agency

Published Opportunities

Applicant Report

Organization Report

Rejection Report

Get Version

Audit Report

Change My Password

Manage Opportunities

Retrieve Submitted
Applications

Assign Agency Tracking
Number and/or Agency
Notes

Set Closing Date Limits

Manage Application
Package Templates

Manage Agency Users

View All Submitted
Applications

Logout of Grants.gov

Home > For Agencies > Manage Opportunities > Grant Opportunity Properties > Synopsis Publish Success

SYNOPSIS PUBLISH SUCCESS

Your opportunity synopsis has been successfully published.

This opportunity synopsis will be available in the Find Grant Opportunities area of Grants.gov within 30 minutes.

Continue

Click **Continue** and you will be directed to the Grant Opportunity Properties screen.

Deleting Synopses

You will only be able to delete a synopsis if there is already an application package posted as part of the grant opportunity properties. If there is not, then you will need to refer to the **Delete Grant Opportunity** section in order to discard the synopsis and recreate the opportunity.

If you want to delete a synopsis and the opportunity does have an application package, in the Manage Opportunities section, use the search function to find the opportunity. Select the grant opportunity and click on the **Modify Opportunity** button.

Once you enter the Grant Opportunity Properties screen, click on **Delete** next to **Synopsis**.

You will be taken to the Confirm Synopsis Deletion screen. Confirm that you want to delete the synopsis for the opportunity by clicking on **Continue** and the grant opportunity synopsis will be deleted. It could take up to 30 minutes for this deletion to occur on the website. If you do not want to delete the

synopsis for the opportunity you selected simply click the on the **Cancel** button and you will be returned to the Grant Opportunities Properties screen.

CONFIRM SYNOPSIS DELETION

Please confirm that you want to delete the synopsis for the following opportunity:

Opportunity Properties

Opportunity Number: CAL-A-TEST

Opportunity Title: Test Funding Opportunity

Continue   Cancel

Attaching Full Announcements/Other Documents

This is an optional functionality on Grants.gov. The Grants.gov PMO suggests that grantors either provide a direct Internet link to a discretionary/competitive grant opportunity's Full Announcement or attach the Full Announcement as a document. The following directions provide information on how to attach the Full Announcement as a document.

In order to attach a Full Announcement or other supporting documents, you must have first created a **Grant Opportunity** and a **Synopsis** for that **Grant Opportunity**. Once you have completed those items, then you can select the grant opportunity from the **Manage Opportunities** section (use the search box to view a list of your opportunities) and click on the **Modify Opportunity** button.

Once you enter the **Grant Opportunity Properties** screen, click on **Attachments** next to **Synopsis**.

Select the **Add** button on the next screen.
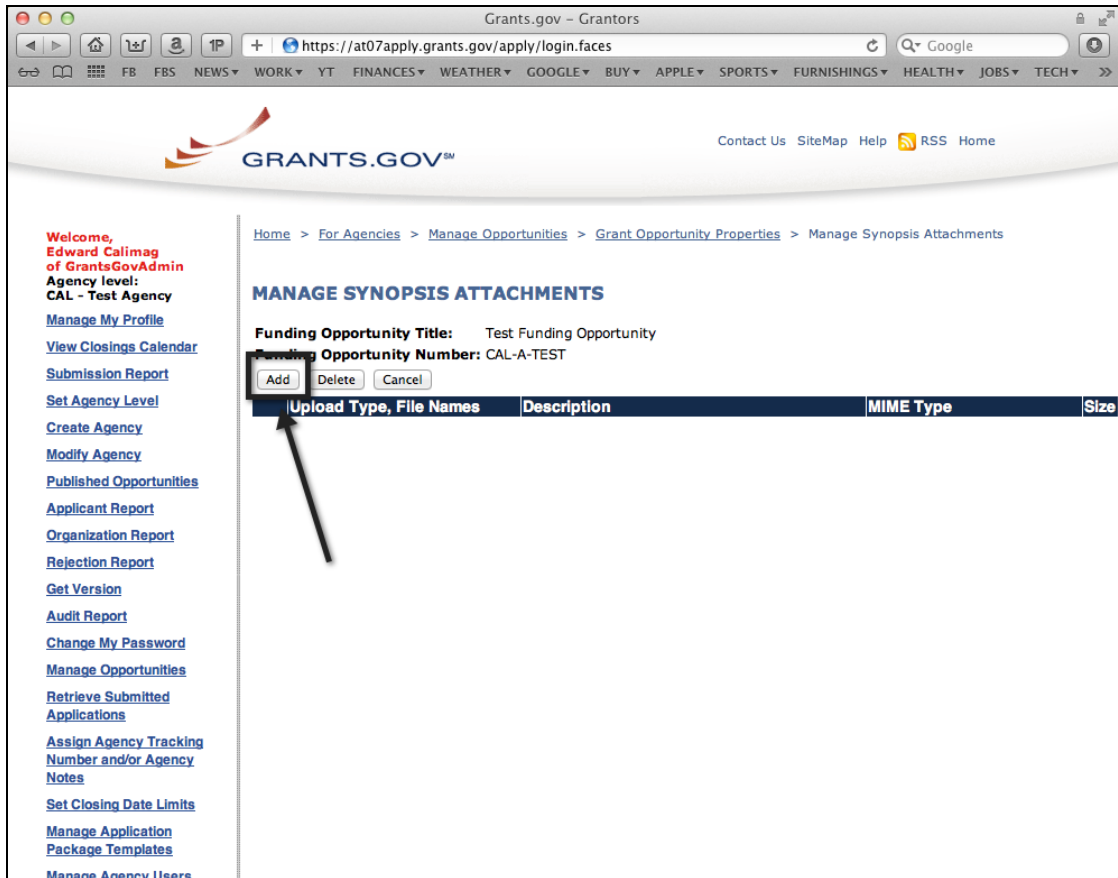
On the next screen, select the number of files you wish to upload and click the **Continue** button.

At the next screen, first select the type of document you wish to attach at **Document Upload Type**. There are three options:

- Full Announcement
- Revised Full Announcement
- Other Supporting Documents

Next, select the **Choose File** button; your file directory will open. Find the file you wish to attach and double click on the icon. The name of the file will appear in the **File Name** box. Enter a brief descriptive title for the attachment in the **Brief Description** box. Repeat this process for each file that you are attaching.

Next, select the **Upload Files** button. Or, select **Cancel** to return back to the **Grant Opportunity Properties** screen.

You will receive a confirmation screen after choosing to upload the files. Review the information and if it is correct, select **Upload Files**. If not, select **Cancel**, and this will return you to the **Grant Opportunity Properties** screen.

After confirming the upload, you will get a **Synopsis Attachment Upload Success** screen. Click **Continue** and you will be directed to the Grant Opportunity Properties Screen.
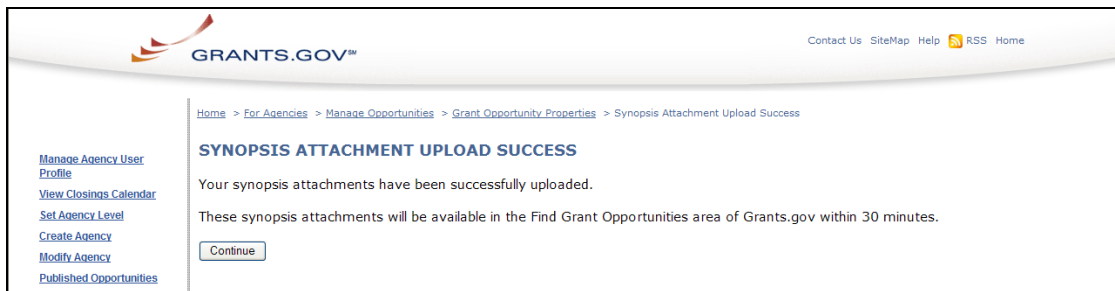
Please be aware that the attachments will be available on the website within 30 minutes of publishing. If you have a post date that is in the future for the synopsis, the attachments will appear at the same time as the future date.

Deleting Full Announcements/Other Documents

In order to delete a Full Announcement or other supporting documents, select the grant opportunity from the **Manage Opportunities** section (use the search box to view a list of your opportunities) and click on **Modify Opportunity**. Once you enter the **Grant Opportunity Properties** screen, click on **Attachments** next to **Synopsis**.
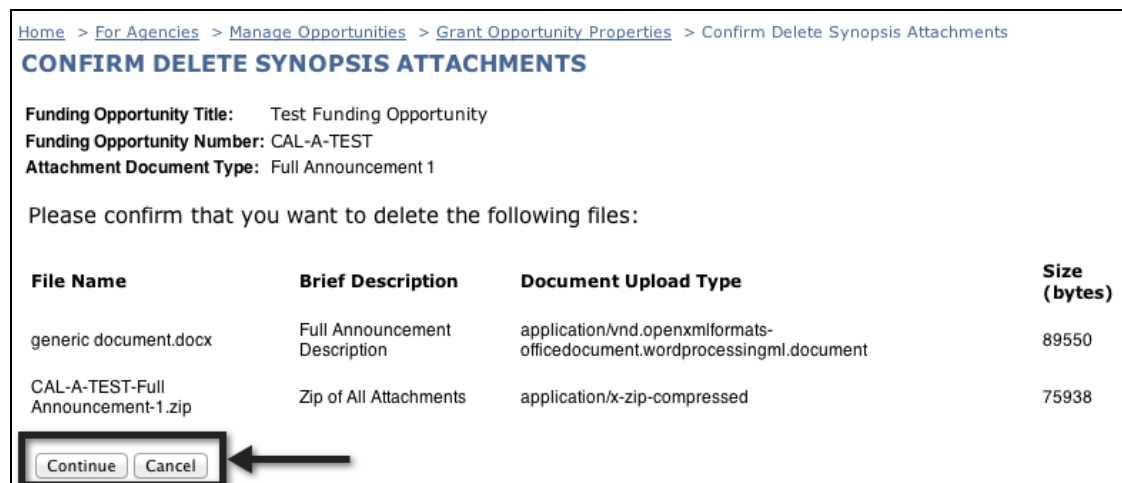
At the next screen, the listing of attachments will be provided. Select the attachments you wish to delete and select **Delete**.

You will not be able to modify these attachments. If you have attached the wrong document, you will need to delete the attachment and then add the correct one by following the directions in **Attaching Full Announcements/Other Documents**.

On the next screen, you will receive a confirmation screen. Select either **Continue** or **Cancel**. Selecting **Cancel** will return you to the Grant Opportunity Properties screen. If you select **Continue**, you will get the Delete Synopsis Attachments Success screen.

The attachments will be deleted from the website within 30 minutes of reaching this screen. Click **Continue** and you will be directed to the Grant Opportunity Properties Screen.

Publishing Application Packages

This section of the site enables you to create, modify, and delete application packages published on Grants.gov. In publishing an application package, you can use an already created grant opportunity or create a new one and utilize the templates created in the Manage Application Package Templates section. As part of this, you will also be able to add instructions specific to each package and review your compiled application package before publishing it to Grants.gov for public view.

This screen displays the current grant opportunities for the agency/agencies that you represent. Each opportunity either has a synopsis, a grant application package or both.

To create a new application package for a new opportunity, click the **Create Opportunity** button above the listed opportunities.

To create a new application package for an existing opportunity use the search box to view a list of your opportunities, then select the opportunity and click the **Modify Opportunity** button above the listed opportunities. At the next screen you will be able to create a new package.

To modify an existing application package, select the opportunity that you want to modify and then click the **Modify Opportunity** button. At the next screen you will be able to select and modify the application package.

(To delete an existing application package, select the opportunity you wish to modify and then click the **Modify Opportunity** button. At the next screen, you will be able to delete the application package. **Note:** You will only be able to delete an application package from the Modify screen if – and only if – a synopsis or more than one application package exists. Otherwise, you will need to delete the entire grant opportunity in order to remove the application package from the system.)

If there is only one application package that needs to be deleted, then select the grant opportunity that needs to be deleted and then click the **Delete Opportunity** button.

Note: Once an application package is modified or deleted, Grants.gov will no longer accept or process any applications that use the previous version of the package. A notice will be sent to the applicants who registered to receive information pertaining to that package to let them know that the package has been modified or deleted.

Creating Application Packages

To create a new package to an existing opportunity, on the Manage Opportunities screen, (use the search box to view a list of your opportunities) select the opportunity you would like to create a new package for.

Then click the **Modify Opportunity** button above the listed application packages. This will take you to the Grant Opportunity Properties screen.

Click on the **Add** button next to Application Packages.

To create new package under a new opportunity, click on the **Manage Opportunities** link on the left of your screen. This will take you to the **Manage Opportunities** screen.

Click the **Create Opportunity** button above the listed application packages.
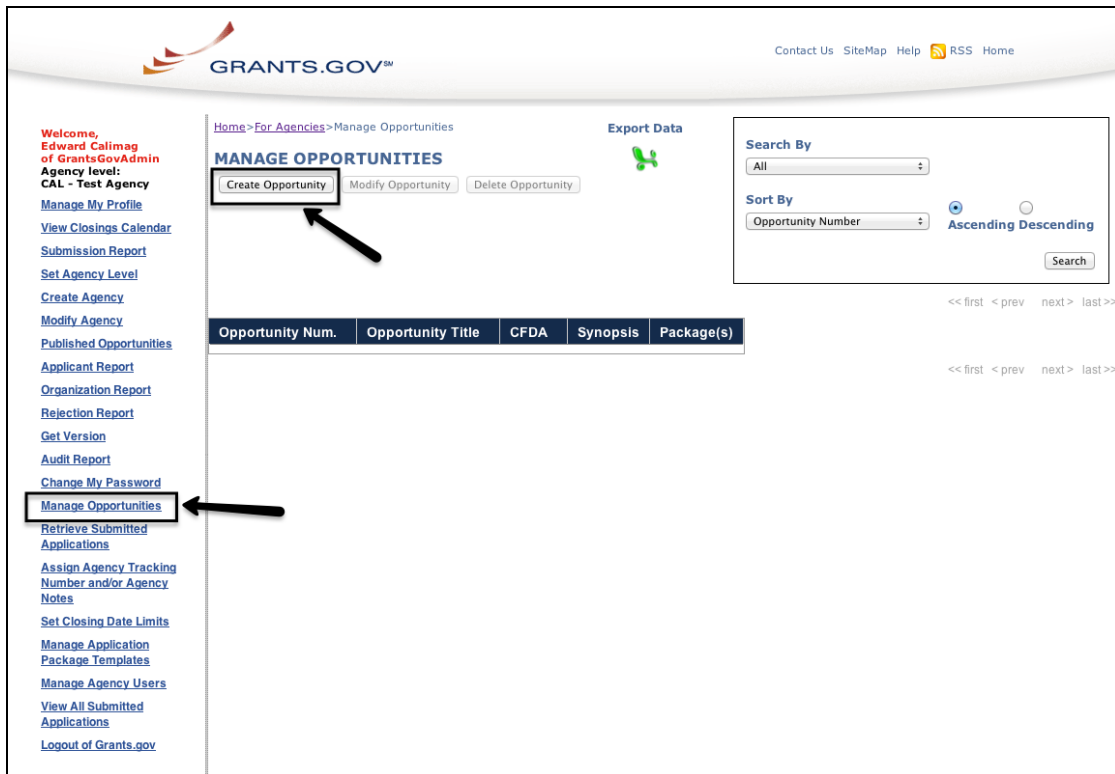
This will take you to the **Grant Opportunities Properties** screen where you can begin to enter information about the new opportunity.

After you entered in the initial grant opportunity's properties, you will select **Add** next to Application Packages. From here you will receive the **New Package Creation** screen. An asterisk marks mandatory fields.

NEW PACKAGE CREATION

Opportunity Number:*	CAL-A-TEST
Opportunity Title:*	Test Funding Opportunity
CFDA Number:	00.000
Competition ID:	
Competition Title:	
Electronic Required:*	⦿ Yes ◯ No
Expected Number of Applications:* *If you are unsure of the expected number of applications, provide your best estimate.	10
Expected Application Size:	5 (MB)
Open Date:	08/16/2011 (MM/DD/YYYY)
Close Date:*	08/31/2011 (MM/DD/YYYY)
Grace Period:	30 days
Agency Contact:	Edward Calimag IT Supervisor E-mail: ed.calimag@hhs.gov Phone: 2026907569
Form Package:*	CAL Standard Generic
Application Instructions:*	Choose File 🅰 Generic Document
Applicant Type:*	Both,Organizations and Individuals

Publish   Cancel

Select your agency's CFDA number in the drop-down menu **CFDA Number** field. This must be a valid CFDA number and published in CFDA.gov.

Entering a Competition ID is necessary if there are multiple packages for an opportunity.

Enter a title for the application package in the **Competition Title** field.

Select Yes or No for the **Electronic Required*** field.

Enter the **Expected Number of Applications** field. This is the number of applications you are expecting to receive. This can be an approximate number.

Enter **Expected Application Size** field. This is the size of the file you expect the grant application to be. This can be an approximate number.

Enter the date by which the opportunity should be made available in the **Open Date** field.
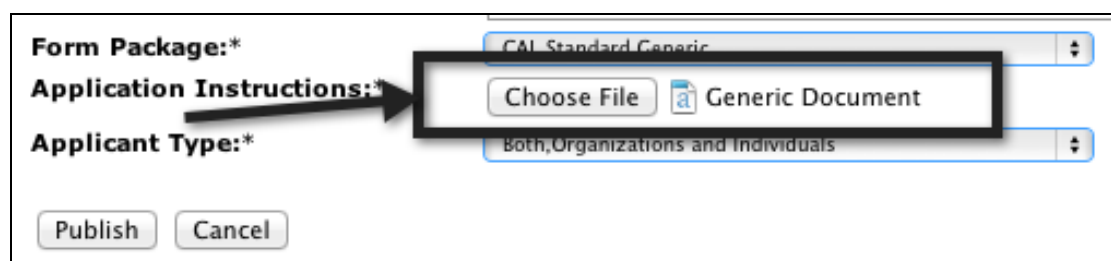
Enter the date after which the application package should no longer be accepted in the **Close Date** field.

Enter the number of days for which the package will have a **Grace Period** field. This period reflects the number of days after the closing date that Grants.gov will continue to accept applications for a grant opportunity. It also represents the day after which applicants will no longer be able to download the application package. This value is entered by an agency when creating a grant opportunity and is not visible to grant applicants.

The **Agency Contact** field lists the first and last name, title, email address and phone number that was entered in your user profile. This information will be listed on the cover page of the application package as the agency contact information. You can edit any of the information listed simply by selecting the text and typing any revisions.

Select the application package template for the application by clicking the arrow next to the **Form Package*** drop-down box. This field must be completed in order to publish the application package.

You can upload application instructions by attaching a file from your computer by clicking the Browse button next to the **Application Instructions*** field. You CANNOT enter a URL to a website in this field. This field must be completed in order to publish the application package.

Form Package:*	CAL Standard Generic	⬍
Application Instructions:*	Choose File	a Generic Document
Applicant Type:*	Both,Organizations and Individuals	⬍

Publish   Cancel

This will open a **Choose File** window where you can browse on your computer to the file, which contains the application instructions.

Select the Applicant Type by clicking the arrow next to the **Applicant Type** drop-down box. This will appear to the applicants who are eligible to apply for the opportunity you are publishing.

If you do not want to save the new the application package, click the **Cancel** button at the bottom of the screen. You will be returned to the **Grant Opportunity Properties** screen.

OR

If you want to save the new the application package, click the **Publish** button at the bottom of the screen.

This will take you to the **Package Publication Verification** screen. Review the information listed.

To view the application instructions that you uploaded, click the **View** link in the **Application Instructions** field.

If the information listed is not correct, click the **Edit** button to return to the previous screen so that you can make any necessary revisions, or click the **Cancel** button to return to the **Grant Opportunity Properties** screen without creating the new application package.

OR

If the information is correct, click the **Publish** button. This will make the new application package available to the public. You will be taken to a **Package Publication Success** screen that will confirm that the new application package is now available for public download.

Click the **Continue** button to return to the **Grant Opportunity Properties** screen. Your new application package will be listed with the other packages published for your agency.

Modifying Application Packages

To modify an application package that is published at Grants.gov, click the **Manage Opportunities** link on the left of your screen.

This will take you to the **Manage Opportunities** screen. This screen displays the current opportunities for the agency/agencies that you represent (use the search box to view a list of your opportunities).

Select the opportunity under which the application package that you want to modify exists.

Click the **Modify Opportunity** button above the listed application packages.

This will take you to the **Grant Opportunities Properties** screen.

Select the appropriate application package by checking the box next to the package and click **Modify**.

On the next screen, make any necessary revisions. **Note:** If you change the template associated with a published application package and an applicant

submits an application which has different forms in it, Grants.gov will reject the application.

You can select to either send or not to send emails to applicants when modifying a package to those applicants who have registered to receive package change notification emails. You can also add specific comments to be included in the notification emails.

If you do not want to save the changes you made to the opportunity, click the **Cancel** button at the bottom of the screen. You will be returned to the **Manage Opportunities** screen and the changes will not be saved.

OR

If you want to save the changes you made to the opportunity, click the **Publish** button at the bottom of the screen to save the changes. This will take you to the **Package Publication Verification** screen. Review the information listed.

To view the application instructions, click the **View** link in the Application Instructions field. If the information is not correct, click the **Edit** button to return to the previous screen so that you can make any necessary revisions, or click the **Cancel** button to return to the **Manage Opportunities** screen.

OR

If the information is correct, click the **Publish** button. This will make the updated application package available to the public. You will be taken to a **Package Publication Success** screen which will confirm that the modified application package is now available for the public to download. The screen will also include whether package notification emails were sent or not, based on your previous selection.

Click the **Continue** button to return to the **Manage Opportunities** screen.

Deleting Application Packages

To delete an application package that is published at Grants.gov, click the **Manage Opportunities** link in the **For Grantors** section, on the left of your screen.

This will take you to the **Manage Opportunities** screen (use the search box to view a list of your opportunities).

This screen displays the current opportunities for the agency/agencies that you represent.
Select the application package that you want to modify by selecting the opportunity.

Click the **Modify Opportunity** button above the listed application packages.

This will take you to the **Grant Opportunity Properties** screen.

Select the appropriate application package by checking the box next to the package and select the **Delet**e button.

This will take you to the **Confirm Package Deletion** screen.

Click the **Cancel** button to return to the previous screen without deleting the application package.

OR

Click the **Delete** button to permanently remove the listed application package.

This will take you to the **Delete Package Success** screen. Click the **Continue** button to return to the **Manage Opportunities** screen. Applicants who had registered to receive notification emails of this package change will be notified about the deletion.

Home > For Agencies > Manage Opportunities > Delete Package Success

DELETE PACKAGE SUCCESS

Your application package has been successfully deleted. Please note that any applications subsequently submitted for the removed application package will be rejected by Grants.gov.

No applicants have registered to be notified of changes to this application package so no removal notifications were sent.
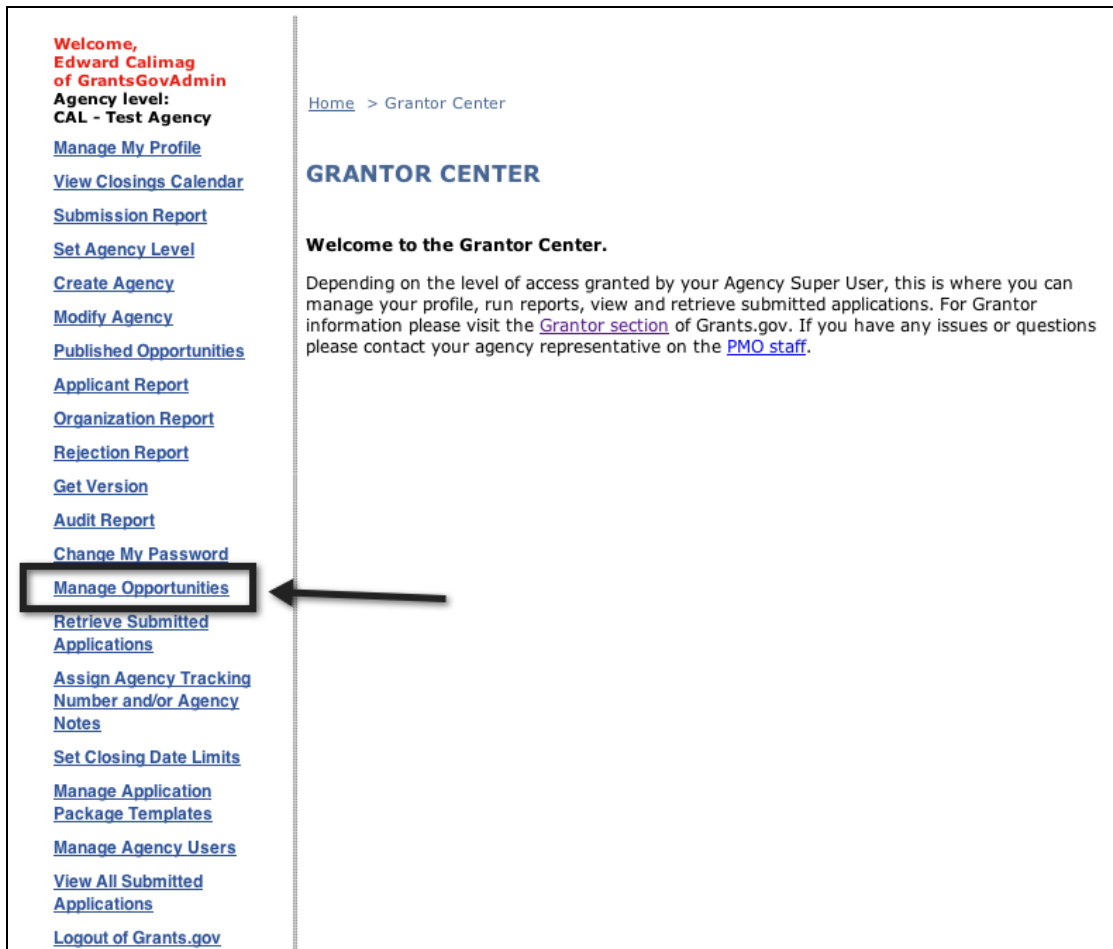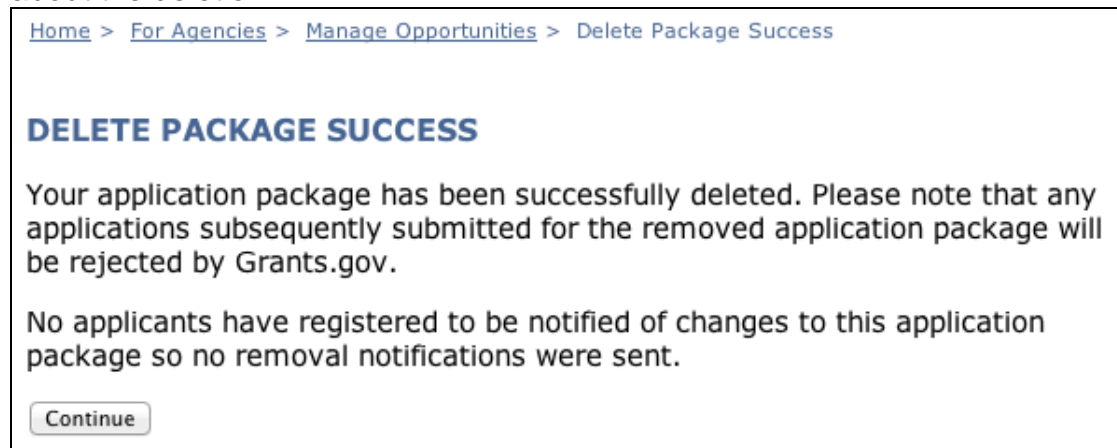
Continue

Managing Package Templates

This section of the site enables you to create, edit and delete application package templates that can be reused for multiple opportunity-specific application packages. Once a template is created, you can then add instructions specific to a particular funding opportunity and publish the application package to Grants.gov through the Publish Application Packages section.

Creating, modifying, and deleting application package templates has no effect on application packages already published on Grants.gov.

To get to the Manage Application Package Templates page, go to the **Agency Login** from Grants.gov. Once you have logged in click on **Manage Application Package Templates** in the left menu (use the search box to view a list of your opportunities) You may also search by "Owning Agency" to see if package templates have already been created for your specific agency. You must use the agency code (e.g. HHS-HRSA) and not the agency name when searching for existing templates under "Owning Agency". If you do not know what your agency code is please contact your agency's Grants.gov Point of Contact or your Grants.gov Program Advisor.

Welcome,
Edward Calimag
of GrantsGovAdmin
Agency level:
CAL – Test Agency

Manage My Profile

View Closings Calendar

Submission Report

Set Agency Level

Create Agency

Modify Agency

Published Opportunities

Applicant Report

Organization Report

Rejection Report

Get Version

Audit Report

Change My Password

Manage Opportunities

Retrieve Submitted Applications

Assign Agency Tracking Number and/or Agency Notes

Set Closing Date Limits

Manage Application Package Templates

Manage Agency Users

View All Submitted Applications

Logout of Grants.gov

Home>For Agencies>Manage Application Package Templates

MANAGE APPLICATION PACKAGE TEMPLATES

[Create Template] [Modify Template] [Delete Template]

Export Data

Search By
Owning Agency

Sort By
Template Name

Equals
CAL

○ Ascending ○ Descending

[Search]

Search returned **14** results

<< first < prev **1** next > last >>

Template Name	Owning Agency	Included Forms
CAL COPS SHORT ATTACHMENT	Test Agency	Mandatory Forms:COPS_Sh_ApplicationAttachment, SF424_2_1 Optional Forms:None
CAL EPA TEST	Test Agency	Mandatory Forms:SF424_2_1, EPA4700_4_2_0, EPA_KeyContacts Optional Forms:None
CAL NEH SUPP	Test Agency	Mandatory Forms:FellowshipsSupplemental_1_1, SF424_Individual_1_1 Optional Forms:None
CAL Standard Generic	Test Agency	Mandatory Forms:SF424_2_1, SF424B, SF424A Optional Forms:Other
CAL TEST SF424 AB	Test Agency	Mandatory Forms:SF424_2_1 Optional Forms:SF424B, SF424A
CAL-PPSL	Test Agency	Mandatory Forms:SF424_2_1, PerformanceSite_1_4 Optional Forms:None
CAL-SF424A	Test Agency	Mandatory Forms:SF424A, SF424_2_1 Optional Forms:None
CDFI FATA CAL	Test Agency	Mandatory Forms:CDFI_2011, SF424_Mandatory Optional Forms:None
COPS APP ATTACHMENT	Test Agency	Mandatory Forms:COPS_ApplicationAttachment_3_0, SF424_2_1 Optional Forms:None
Calimag HHS Checklist and Certs	Test Agency	Mandatory Forms:SF424_2_1 Optional Forms:HHS_CheckList_2_1, HHS_Certifications
Calimag Short Org	Test Agency	Mandatory Forms:SF424_Short_1_1 Optional Forms:None
FTDETRICK TEST	Test Agency	Mandatory Forms:RR_KeyPerson, RR_SF424_1_2, RR_Budget Optional Forms:RR_PersonalData_1_2, RR_SubawardBudget
HUD TEST EAC	Test Agency	Mandatory Forms:HUD_FiscalActivity, HUD_LeadFactor3, FaithBased_SurveyOnEEO, HUD_RaceEthnic, HUD_DetailedBudget, HUD_DisclosureUpdateReport, HUD_FaxTransmittal, SF424_2_1 Optional Forms:EPA_KeyContacts, EPA4700_4_2_0
NEH TEST	Test Agency	Mandatory Forms:NEHInstitutionalProfile, SF424_Short_1_1 Optional Forms:None

<< first < prev **1** next > last >>

Creating Application Package Templates

To create a new application package template that can be used to create multiple opportunity specific application packages, click the **Manage Application Package Templates** link on the left of your screen.

This will take you to the **Manage Application Package Templates** screen (use the search box to view a list of your opportunities). This screen displays the available application package templates.

Creating application package templates has no effect on application packages already published on Grants.gov.

Click the **Create Template** button above the listed application package templates.

This will take you to the first step to creating a template. You will need to select which form family you will use. To select a form family click on the drop-down menu, choose the form family and then hit the **Continue** button.

On the Create New Application Package Template screen, start to enter the information for the template. You will only see the forms that have been developed to be used with your selected forms family.

CREATE NEW APPLICATION PACKAGE TEMPLATE

This screen allows you to create new application package templates that can be used to create an application package for a specific funding opportunity based on the template.

When you have made the necessary revisions, click the "Save" button to save the modifications.

Click the "Cancel" button to return to the Manage Application Package Templates screen without saving any revisions.

Please note that creating and editing templates has no effect on opportunities already published in Grants.gov.

Form Family: SF424 Family
Package Name: *   [   ]

Available Forms
ACH Vendor/Miscellaneous Payment Enrollment Form
ANA Application Information
Assurances for Construction Programs (SF-424D)
Assurances for Non-Construction Programs (SF-424B)
Attachments
Basic Budget Form
Basic Work Plan
BUDGET INFORMATION - Construction Programs
Budget Information for Non-Construction Programs (SF-424A)
Budget Narrative Attachment Form
CD511 Form
Certification of Compliance
COPS Application Attachment to SF-424
COPS Budget
COPS Short Application Attachment to SF-424
CSREES Application Modification
CSREES NRI Proposal Type Form
Dept of Education Combined Assurances (ED-80-0013)
Dept of Education Supplemental Information for SF-424
Disclosure of Lobbying Activities (SF-LLL)
DOE SEP Narrative Information Worksheet
DOL BudgetInformationForm LMIBase Programs
DOL_BudgetInformationFormLMIAAMC

[>>]
[<<]

Mandatory Forms
Application for Federal Assistance (SF-424) (Required)
No Additional Forms/Attachments

Optional Forms
No Additional Forms/Attachments

[>>]
[<<]

[Save]   [Cancel]

Enter a name for the application package template in the **Package Name** field. This field must be completed in order to create the new application package template.

The **Available Forms** box lists the forms that can be included in the template. **Note:** The SF-424 is a required form for all applications. To assign the forms that are not required but may be used to provide additional support for the application, select the form name by clicking on it. Then click the double arrows pointing toward the right **>>** next to the **Optional Forms** box.

To assign the forms required for the application, select the form name by clicking on it and click the double arrows pointing toward the right **>>**next to the **Mandatory Forms** box. To remove a form from the **Mandatory Forms** or **Optional Forms** box, select the form name by clicking on it. Then click the double arrows pointing toward the left **<<** next to the appropriate box.

If you do not want to save new the application package template, click the **Cancel** button at the bottom of the screen. You will be returned to the **Manage Application Package Templates** screen where the new application package template will not appear.

OR

If you want to save the new application package template, click the **Save** button at the bottom of the screen. You will be returned to the **Manage Application Package Templates** screen where the new application package

template will appear. The screen can be refreshed by executing the search functionality.

Modifying Application Package Templates

To modify an existing application package template, click the **Manage Application Package Templates** link on the left of your screen.

Note: Modifying application package templates has no effect on application packages already published on Grants.gov, but it is suggested that you rename the application package template to a name to differentiate it from your existing agency application package templates.

This will take you to the **Manage Application Package Templates** screen. This screen displays the available application package templates. To view all templates please click the **Search** button in the upper right of the page.

Select the application package template that you want to modify by clicking on that template's row.

Click the **Modify Template** button at the top of the page.

This will take you to the **Modify Existing Application Package Template** screen.

Make any necessary revisions.

If you do not want to save the changes you made to the application package template, click the **Cancel** button at the bottom of the screen. You will be returned to the **Manage Application Package Templates** screen and the revisions will not be saved.

OR

If you want to save the changes you made to the application package template, click the **Save** button at the bottom of the screen. You will be returned to the **Manage Application Package Templates** screen and the revisions will be saved.

Note: The changes you made to the template will not be reflected in application packages that have already been published using the template. You will need to modify the application package and reselect the template in order for those changes to be reflected.

Also, you will only be able to modify templates that belong to your agency. You may select another agency template, give it a different name and save the template to your organization as the screen shot example above displays.

Deleting Application Package Templates

To delete an existing application package template, click the **Manage Application Package Templates** link on the left of your screen. **Note:** Deleting application package templates has no effect on application packages already published on Grants.gov.

This will take you to the **Manage Application Package Templates** screen. This screen displays the available application package templates. To view all templates please click the **Search** button in the upper right of the page.

Select the application package template that you want to delete by clicking on that template's row. **Note:** You will not be able to delete application package templates that your agency did not create.

Click the **Delete Template** button at the top of the page. This will take you to the **Delete Application Package Template Verification** screen.

Home > For Agencies > Manage Application Package Templates > Delete Application Package Template Verification

DELETE APPLICATION PACKAGE TEMPLATE VERIFICATION

You are about to delete this Package Template from the Grants.gov database. Please review the details of the template below and make absolutely sure that you wish to delete it, before pushing the "Delete" button below.

Please note that creating and editing templates has no effect on opportunities already published in Grants.gov

Template Name: CAL TEST SF424 AB
Mandatory Forms: Application for Federal Assistance (SF-424)

Optional Forms: Assurances for Non-Construction Programs (SF-424B)
Budget Information for Non-Construction Programs (SF-424A)

[Delete] [Cancel]

Click the **Delete** button to permanently remove the listed template. OR Click the **Cancel** button to return to the previous screen without deleting the listed template.

Retrieving Submitted Applications

To retrieve and download the applications submitted to your agency, simply click the **Retrieve Submitted Applications** link on the left of your screen.

This will take you to the **Retrieve Submitted Applications** screen (use the search box to list the applications available for download).

Select the applications that you want to download by selecting the applications.

Once you have selected the application, the **Download Application(s)** button will become active. Click the **Download Application(s)** to begin the retrieval process.

To return to the previous screen without downloading the applications, click the **Back** button.

OR

To download the listed applications, click the **Download Applications** button. This will open the **File Download** screen and you will be prompted to save the application to your computer.

Select the location where you want to save the application and click the **Save** button.

After download, **Acknowledge Completion of Download** button will be active.

Verify that the application downloaded properly to your computer and then click the **Acknowledge Completion of Download** button. This will complete the download process and return you to the **Retrieve Submitted Applications** screen where the application will no longer appear. An email is sent to the AOR when an application is acknowledged.

If you need to "re-retrieve" an application, simply click the **View All Submitted Applications** link on the left of the screen.

This will take you to the **View All Submitted Applications** screen (use the search box to view a list of the applications) where all applications submitted to your agency will be listed.

Select the applications that you want to download by selecting the application row.

Click the **Download Application(s)** button to download the applications. This will begin the retrieval process.

To return to the previous screen without downloading the applications, click the **Back** button.

OR

To download the listed applications, click the **Begin Download** button.

This will open the **File Download** screen and you will be prompted to save the application to your computer.
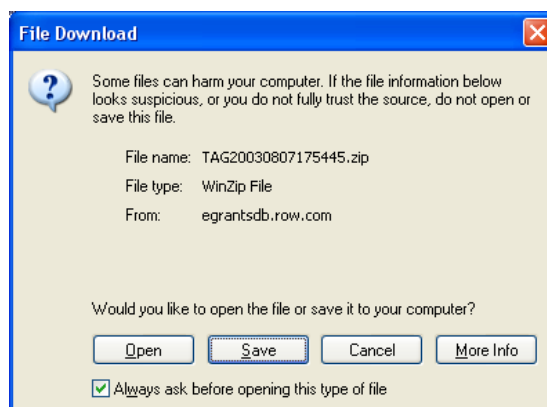
Click the **Save** button. This will open the **Save As** window.
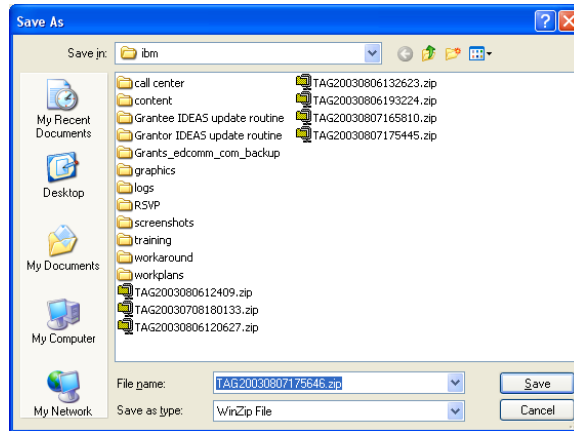
Select the location where you want to save the application and click the **Save** button.

Assigning Agency Tracking Numbers and Agency Notes

Assigning agency tracking numbers allows you to assign a unique number to a submitted application that your agency can use internally for application identification. Agencies can also assign notes to submitted applications to be viewed by their applicants. Agency notes can be added/updated to application submissions that are in "Received by Agency" state or "Agency Tracking Number Assigned" state.

Before you can assign a tracking number or applicant notes, you will need to retrieve the submitted applications and acknowledge completion of download. This procedure can be found in the **Retrieving Submitted Applications** topic.

To view the submitted applications which need a tracking number or agency notes assigned, click on the **Assign Agency Tracking Number and/or Agency Notes** on the left of the screen.

This link will open up the **Agency Tracking Number/Notes Assigner** screen. Select one of the options in the `Search By` dropdown and select the Search button to view the applications to which the agency tracking number and/or notes can be assigned agency notes.

To assign both Agency Tracking Number and/or Agency Notes, simply click on the **AssignTrackingNumberAndNotes** link within the Agency Tracking #and Notes field of the specific application submission you need to assign a tracking number and/or agency notes to.

A pop-up screen will appear with fields to enter the Agency Tracking Number and Notes. Both of these fields are optional. You may assign Notes without assigning an Agency Tracking Number. You may assign an Agency Tracking Number without assigning Notes.

Click the Submit button in order to complete the assignment or Click the box at the right-hand corner in order to cancel.

You can view the change by clicking the **View All Submitted Applications** link on the left of the screen. Additionally, Notes may be further edited by using the same screen. (Agency Tracking Number cannot be edited.)

Note: Every time notes are added or edited, AOR's will receive email notification including the actual notes added/edited to the application submission. An email is sent to the AOR when the agency tracking number is assigned.

To narrow your search, you can search by several categories. Categories include the following: Default; All; CFDA; Opportunity Number; Comp ID; Grants.gov #; and Date Received.

The Default search result provides all applications in "Received by Agency" status" (i.e., applications that have been acknowledged by the agency).

The All search result provides all applications in "Received by Agency" status and "Agency Tracking Number Assigned" status.

Note: Grantors can only assign Agency Tracking Numbers one time, whereas, there is no limit to the number of times Agency Notes can be assigned/edited.

Managing Agency Users

This section of the site enables you to reassign roles, view a user profile and deactivate agency users.

To reassign roles, view a user profile and/or deactivate an agency user select the **Manage Agency Users** link on the left menu. Use the search box to view a list of your agency users.

This screen displays the users currently registered with the agency that you represent. Select the user you want to reassign roles, view profile/or deactivate. Selecting the user will activate the **Reassign Roles**, **View Profile** and **Deactivate User** buttons.

To reassign user roles, select the user and then select the **Reassign Roles** button. Select the roles for the user and use the arrows pointing to the right for the role to appear in the Current Roles box. The Single arrow can be used to move selected roles. The Double arrow can be used to move all the roles. Once completed, check the verification box and select the **Continue** button to assign roles. To cancel, select the **Cancel Reassign** button.

To view an existing user's profile, select the user and then select the **View Profile** button. For more details on how to view a user profile, go to the **View Agency User Profile** section of this document.
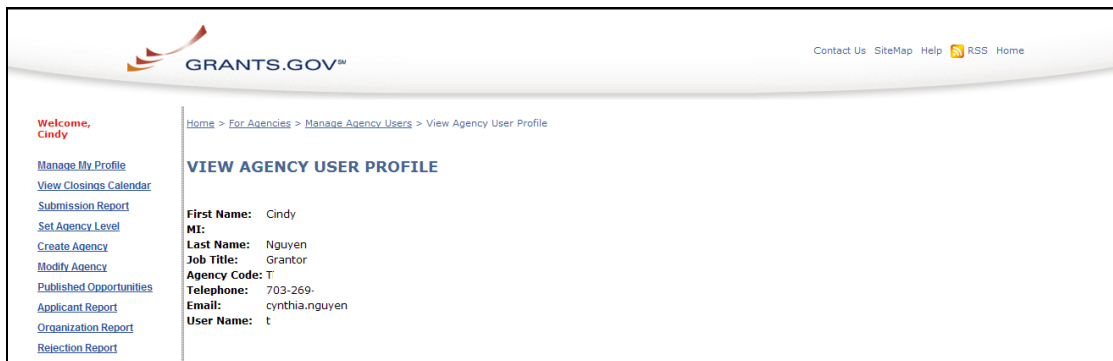
To deactivate an existing user, select the user and then select the **Deactivate User** button. To cancel, select the **Cancel** button. For more details on how to deactivate a user profile, go to the **Deactivate Agency User** section of this document.
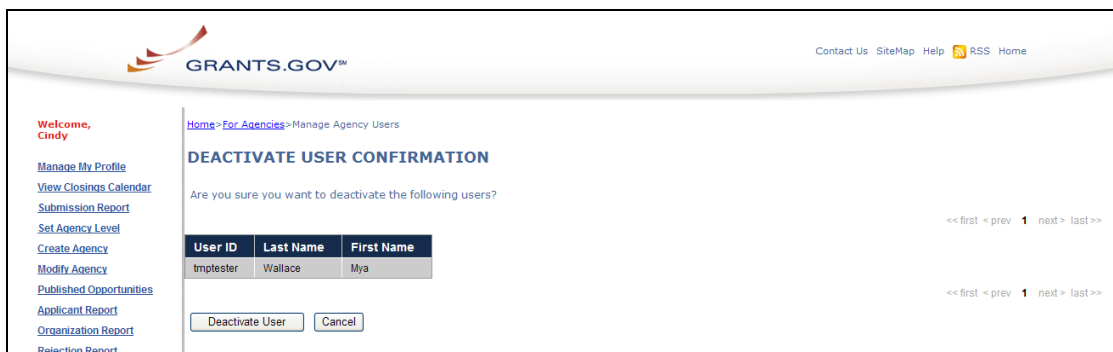
Reassigning Roles

To reassign user roles, click the **Manage Agency Users** link on the left of your screen.

This will take you to the **Manage Agency Users** screen. Use the search box to display the list of users.

This screen displays the users currently registered with the agency.

Select the user you want to modify and then select the **Reassign Roles** button above the listed users.
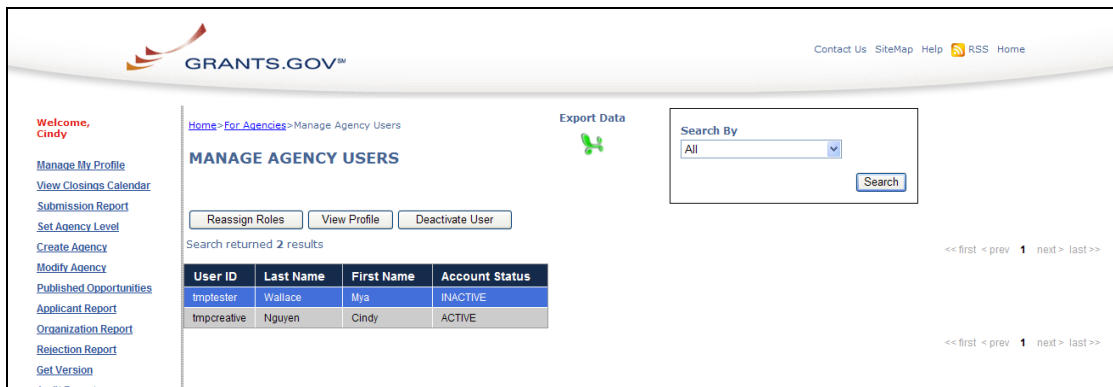
This will take you to the **Reassign User Roles** screen.

The **Current Roles** table lists the roles which are currently assigned to the user.

To add a role to the user, select the role that you want to assign to the user in the **Remaining Roles** table by clicking it. Then click the double arrow pointing to the right **>>**. The role will move from the **Remaining Roles** table to the **Current Roles** table. The Single arrow can be used to move the selected roles. The Double arrow can be used to move all the roles.

To remove a role from the **Current Roles** table, select the role by clicking it and then click the double arrow pointing to the left **<<**. The Single arrow can be used to move the selected roles. The Double arrow can be used to move all the roles. The role will move from the **Current Roles** table to the **Remaining Roles** table.
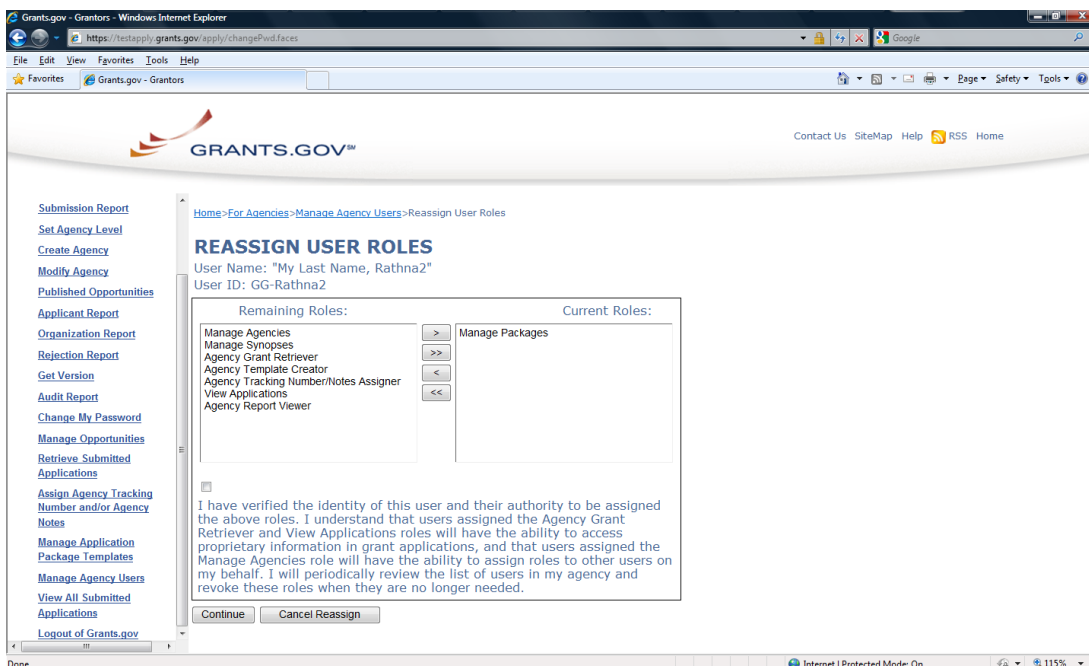
If you do not want to save the changes to the user roles, click the **Cancel Reassign** button at the bottom of the screen. You will be returned to the **Manage Agency Users** screen and the changes will not be saved.

OR

If you want to save the changes to the user roles, check the box on the screen stating that you have verified the users and their authority to be assigned the roles you have assigned. Then click the **Continue** button at the bottom of the screen. You will be returned to the **Manage Agency Users** screen and the changes will be saved.

Role Definitions:

The **Manage Packages** role allows a user to publish application packages.

The **Agency Grant Retriever** role allows a user to retrieve applications that are submitted to your agency.

The **Agency Tracking Number/Notes Assigner** role allows a user to assign tracking numbers and Agency Notes to submitted applications.

The **Agency Template Creator** role allows a user to manage application package templates.

The **Manage Agencies** role allows a user to manage agencies.

The **View Applications** role allows a user to view the applications submitted to your agency.

The **Manage Synopses** role allows a user to setup grant synopses within your agency's grant opportunities.

The **Agency Report Viewer** allows a user to view reports such as applicant and organization reports.
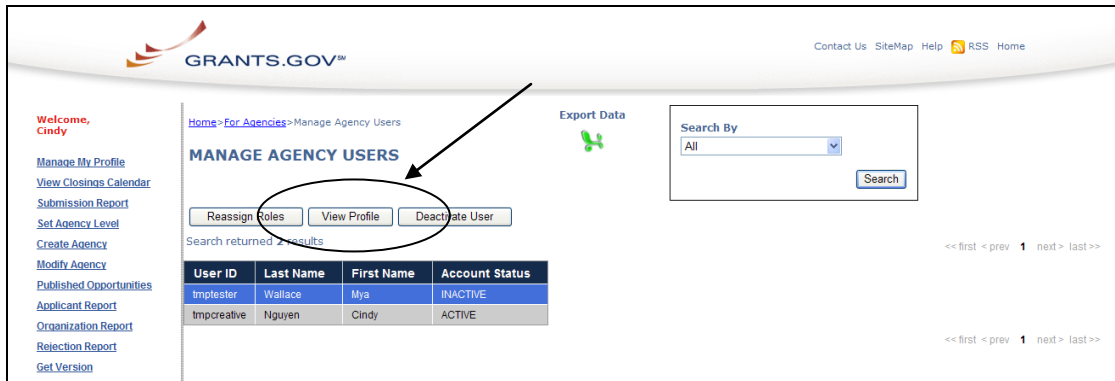
Viewing Agency User Profile

To modify an existing agency user profile, click the **Manage Agency Users** link on the left of your screen.

This will take you to the **Manage Agency Users** screen. Use the search box to display the list of users.

This screen displays the users currently registered with the agency.

To view an existing user's profile, select the user and then select the **View Profile** button.

Once selected you will be able to view the agency user profile and provide the user with their username and email on file with Grants.gov to access their account using the **I Forgot My Password/Unlock My Account** functionality.

Deactivate Agency User

To deactivate an existing agency user profile, click the **Manage Agency Users** link on the left of your screen. This will take you to the **Manage Agency Users** screen. Use the search box to display the list of users.

Select the user profile that you want to deactivate by selecting the user. Click the **Deactivate User** button above the listed users.

This will take you to the **Deactivation Confirmation** screen. Click the **Delete User** button to deactivate the user account. Note that roles assigned to te user will be removed when a user is deactivated.

OR

Click the **Cancel** button to return to the previous screen without deactivating the listed user.

Managing Agencies

This section shows you how to create and modify agency/sub-agency profiles, and set agency levels.

Note: If an agency or sub-agency needs to delete an agency or sub-agency you will need to contact Grants.gov PMO to do so.

To modify your agency profile, click the **Modify Agency** link in the left menu.

To create an agency/sub-agency, click the **Create Agency** link in the left menu.

To set your agency level, click the **Set Agency Level** link in the left menu.

To modify an existing sub-agency, select the sub-agency that you want to modify by clicking on the sub-agency's name and then click the **Set Agency Level** button above the list. Once you have set the agency level you can modify the agency profile by clicking on the **Modify Agency** link in the left menu.
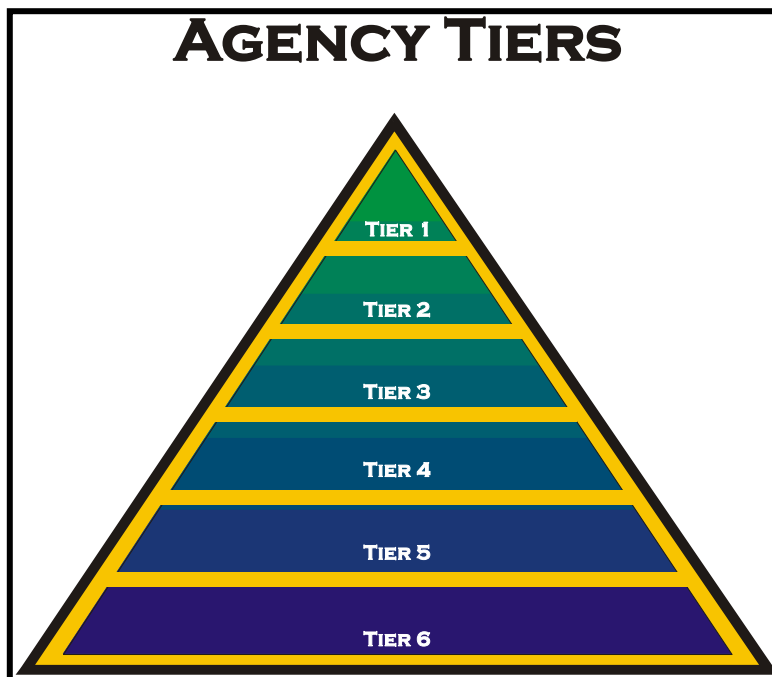
The Grants.gov tiers are linear in that the Tier 1 agency is referred to as the "parent agency." Tiers 2-6 are "sub-agencies" within the "parent agency."

SAMPLE AGENCY STRUCTURE

TIER 1

TIER 2

TIER 3

TIER 4
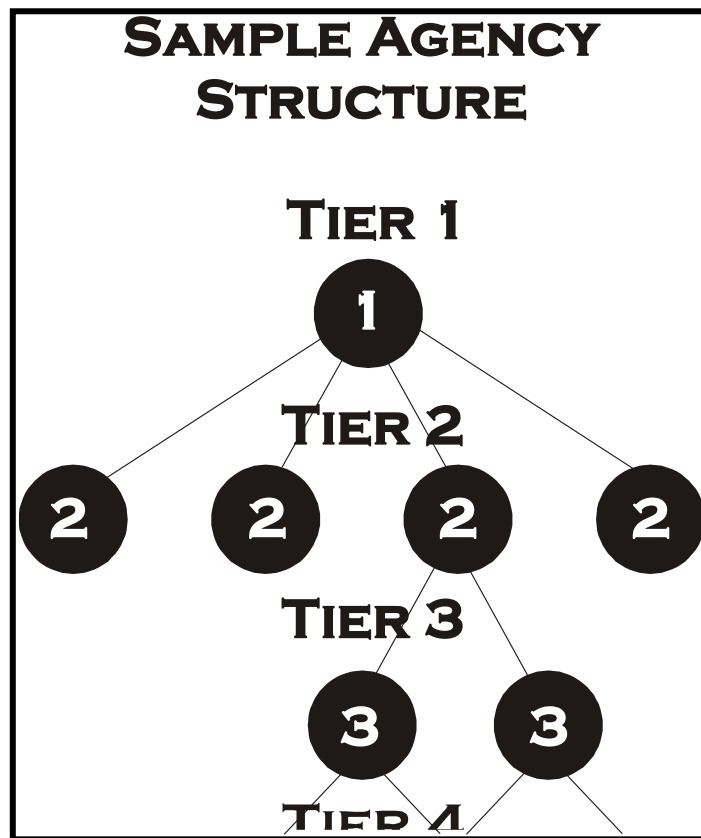
The above graphic is a sample of how the agency and sub-agency structure might look. You may have numerous sub-agencies registered with the parent agency.

How Agency Enrollment Codes Work

When you sign up as a new user, you are required to enter an Agency Enrollment Code. This code designates to which agency you are assigned. The Agency Enrollment Code is created from the Agency Code entered when creating an agency. The code combines the Agency Codes of your agency and those of your "parent" agencies, separating them by hyphens.

For example, if Tier 1's agency code is T1, Tier 2's agency code is T2, Tier 3's agency code is T3 and so on, and you wanted to register with the Tier 3 "sub-agency," your Agency Enrollment Code would be T1-T2-T3. Contact your agency's Grants.gov POC (or Super-user) or the Grants.gov Program Management Office if you are unsure of what your enrollment code is.

What You Can See When You Log In

When you login to the **For Grantors** section of the site, you are logging into a specific agency in a specific tier.

You will have access to functionalities depending on your assigned roles. For example, you will be able to view:
The application packages created by the current agency you are logged into

The application package templates created by the current agency you are logged into (you can see all templates on Grants.gov but you can only modify or delete your agency's template).

The application packages which your agency created that have been downloaded, completed and submitted by grant applicants. You will be able to retrieve and assign agency tracking numbers and/or notes to these applications.
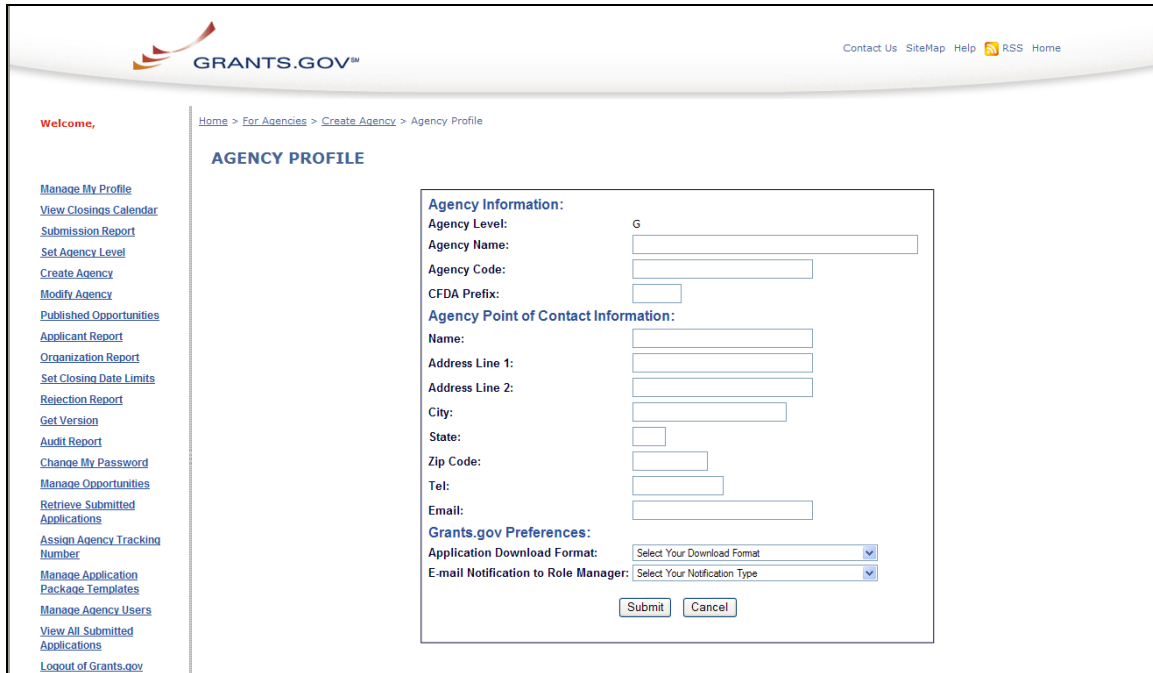
The users registered with your agency and the agencies which are one tier below your agency.*

*To view the users or access other functionalities on behalf of the agencies registered one tier below your agency, you will need to change the **Set Agency Level** to the tier below the parent agency.

Creating Agencies

To create a new agency, click the **Create Agency** link on the left of your screen.

This will take you to the **Agency Profile** screen.

Enter the agency's name in the **Agency Name** field. You only need to enter the name for the specific agency that you are registering.

Enter a code for the agency which you are creating in the **Agency Code** field. When the new agency is completed, it will have the prefix of the Parent Agency and the newly created sub-agency. Example: HHS-NIH or DOD-AFOSR-DURIP

Enter the agency's CFDA prefix in the **CFDA Prefix** field.

Enter a point of contact name for the agency in the **Name** field.

Enter the street address at which the agency contact works in the **Address** field.

Enter the city in which the agency contact works in the **City** field.

Enter the state in which the agency contact works in the **State** field.

Enter the zip code in which the agency contact works in the **Zip Code** field.

Enter the business phone number for the agency contact in the **Tel** field.

Enter the business email address for the agency contact in the **Email** field. Depending on the **E-mail Notification to Role Manager** selection, this email address will be used to send notification emails when an application is validated.

Select the format for which applications will be able to be downloaded by clicking the arrow next to the **Application Download Format** drop-down box.

Select the email notification to the agency's role manager by clicking the arrow next to the **Email Notification to Role Manager** drop-down box.

If you do not want to save the new agency, click the **Cancel** button.

OR

If you want to save the new agency, click the **Submit** button.

Modifying Agencies/Sub-Agencies

To modify an agency or sub-agency click the **Set Agency Level** link on the left of your screen.

This will take you to the **Set Agency Level** screen. This screen displays the registered agencies that you represent. Select the agency or sub-agency profile that you want to modify by clicking in the name of the agency or sub-agency in the list.

Once you have selected the agency or sub-agency click **Set Agency Level** button at the top of the screen. Then on the left menu click the **Modify Agency** link. This will take you to the **Agency Profile** screen. Make any necessary revisions.

If you do not want to save the changes you made to the agency or sub-agency profile, click the **Cancel** button at the bottom of the screen.

OR

If you want to save the changes you made to the agency or sub-agency profile, click the **Submit** button at the bottom of the screen to save the changes.

Set Agency Levels

To set a new agency level, click the **Set Agency Level** link on the left of your screen.

This will take you to the **Set Agency Level** screen. This screen displays the registered agencies that you represent.
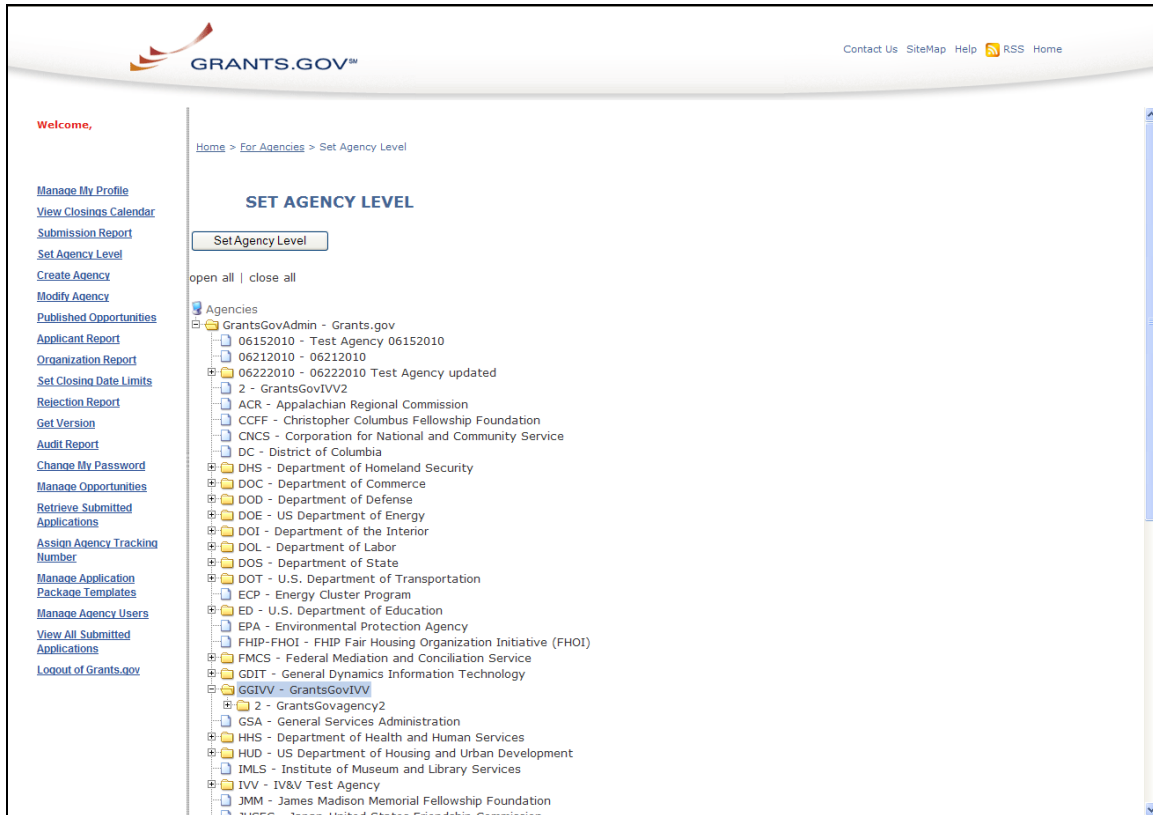
Select the agency level by clicking on the name of the agency you wish to be set to and then select the **Set Agency Level** button at the top of the list.

You will now be in the level that you selected. Reference your name with the agency you selected in the left-hand top side of the screen. It should now say your name with the level you are currently in underneath your name.

Viewing Applications

To view the applications submitted to the agency or agencies that you represent, click the **View All Submitted Applications** link on the left of your screen.

This will take you to the **View All Submitted Applications** screen. To view a listing of applications use the search box. You can search for applications by using options in the dropdown box such as: CFDA, Opportunity Number, Competition ID, Grants.gov Number and Agency Tracking Number and then sort the search results by using the drop-down menu.

You can also re-retrieve submitted applications from this screen. For more information, refer to the **Retrieving Submitted Applications** topic.

Once you have selected the application(s) that you wish to download, click the **Begin Download** button.

Click the **Open** button to open the zip file, or you can save the file on your computer or storage device.

To obtain the manifest double click on the file name and the manifest text file will be included in the zip.
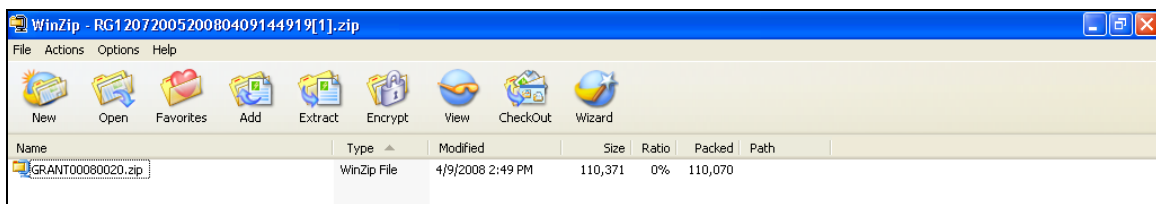
Reports

Submission Report

View Information pertaining to an application submission using the Submission Report. Information such as application submission Date/Time Received, Agency, Status, Submitter's User ID, Applicant Name, DUNS in application and Submitter's DUNS number can be attained from this Submission Report by using an applicant's Grants.gov Tracking Number.

Excel reports are available for download for the following areas:

- Published Opportunities
- Organization Report
- Manage Opportunities
- Retrieve Submitted Applications
- Manage Agency Users
- View All Submitted
- Rejection Report
- Manage Application Package Templates
- Assign Agency Tracking Number and Notes

A green "X" icon representing the Microsoft Excel logo has been added to the above mentioned screens to provide a visual cue so grantors know which reports

will generate an Excel spreadsheet. All data pertaining to a particular report will be included within an easily managed Excel spreadsheet format, which can be modified according to your agency's needs. To download any of the reports in the areas the report is available, select the Export Data icon and save the file to your storage device (e.g., desktop, hard drive or CD).

Published Opportunities

View Information pertaining to your grant opportunities such as the **CFDA Number, Funding Opportunity Number (FON)**, **Competition ID**, **Opening Date**, **Grace Period**, **Number of Applications**.

Organization Report

View Information pertaining to your grantee organizations such as **Authorized Organization Representative's (AOR): Last Name**, **First Name**, **User ID**, **Email Address**, **Telephone Number**, **Registered with Grants.gov** (status), **Ebiz POC Email address** status and **CCR Expiration Date**.

Manage Opportunities

View Information pertaining to your grant opportunities such as the **Opportunity Number**, **Opportunity Title, CFDA Number, Synopsis** and related application **Packages** for the Manage Opportunities report.

Export Data

MANAGE OPPORTUNITIES

| Create Opportunity | Modify Opportunity | Delete Opportunity |

Search By
All

Sort By
Opportunity Number

○ Ascending ○ Descending

Search

<< first < prev   next > last >>

| Opportunity Num. | Opportunity Title | CFDA | Synopsis | Package(s) |

<< first < prev   next > last >>

Retrieve Submitted Applications

View Information pertaining to your grant opportunities such as the **Opportunity Number**, **Opportunity Title, CFDA Number, Synopsis** and related application **Packages** for the Retrieve Submitted Applications report.

Export Data

RETRIEVE SUBMITTED APPLICATIONS

Download Application(s)

Please note that grant applications ...(more)

Search By
All

Sort By
CFDA

○ Ascending ○ Descending

Search

<< first < prev   next > last >>

| CFDA | Funding Opportunity # | Competition Id | Grants.gov # | Program Name | Submitter | Date/Time Received |

<< first < prev   next > last >>

Manage Application Package Templates

View Information pertaining to your grant opportunities such as the **Template Name**, **Owning Agency** and **Included Forms.**

Export Data

MANAGE APPLICATION PACKAGE TEMPLATES

| Create Template | Modify Template | Delete Template |

Search By
All

Sort By
Template Name

○ Ascending ○ Descending

Search

<< first < prev   next > last >>

| Template Name | Owning Agency | Included Forms |

<< first < prev   next > last >>

Manage Agency Users

View Information pertaining to your grant opportunities such as the agency users **User ID**, **Last Name** and **First Name**.

View All Submitted Applications

View Information pertaining to your grant opportunities such as the **CFDA Number, Opportunity Number**, **Comp. ID, Grants.gov Tracking #, Submission Date/Time Received, Status, Agency Tracking** and **Agency Notes** to submitted applications.

Rejection Report

The **Rejection Report** feature allows grantor users to identify the exact cause of an application rejection. **Agency Rejection** report provides a detailed explanation as to why a submission was rejected, it also gives information on the submission and allows you to search and sort information associated with the submission including: **Grants.gov Tracking Number**, **Received Date/Time**, **Rejection Message**, **Status Date, DUNS, Owner** (**AOR's User ID), Legal Business Name, AOR Name, AOR Email Address**, **Legal Name, Project Name (CFDA Title),CFDA, Opportunity Number, Comp. ID, Opening Date and Closing Date** Use the scroll bar (at the bottom of the Rejection Report screen) to view all the information in this report.